

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT		1. CONTRACT D CODE		PAGE OF PAGES 1 2	
2. AMENDMENT/MODIFICATION NO. 000001		3. EFFECTIVE DATE 12/08/2010		4. REQUISITION/PURCHASE REQ. NO.	
6. ISSUED BY Social Security Administration Office of Acquisition and Grants 1st Floor - Rear Entrance 7111 Security Boulevard Baltimore MD 21244-1811		CODE 00600		5. PROJECT NO. (If applicable)	
		7. ADM NISTERED BY (If other than Item 6) ERICA DAY (410) 965-9512		CODE EDAY	
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) BOOZ ALLEN HAMILTON INC. Attn: Natalie McDonald 8283 GREENSBORO DRIVE MCLEAN VA 221023838		(x)		9A. AMENDMENT OF SOLICITATION NO.	
				9B. DATED (SEE ITEM 11)	
		x		10A. MODIFICATION OF CONTRACT/ORDER NO. SS00-10-60103	
				10B. DATED (SEE ITEM 13) 09/29/2010	
CODE		FACILITY CODE			

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

- ☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended ☐ is not extended.
Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

See Schedule

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
X	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
	D. OTHER (Specify type of modification and authority)

E. IMPORTANT Contractor ☒ is not. ☐ is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

DUNS Number: 006928857

Beneficiary Access and Support Services (BASS) contractor.

The purpose of this administrative modification is to provide more detailed information for the invoicing instructions as it relates to the Fixed Fee.

Fixed Fee should be billed by prorating the negotiated fixed fee to costs incurred. The contract calls for a reserve of the fixed fee after payment of 85% of that fee. For the Base Period, that means that after paying (b)(4), the voucher shall reflect a 15% Continued ...

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) ERICA N. DAY	
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)	15C. DATE SIGNED	16B. DATE SIGNED 12/08/2010	

CONTINUATION SHEET

REFERENCE NO. OF DOCUMENT BEING CONTINUED
SS00-10-60103/000001PAGE OF
2 2NAME OF OFFEROR OR CONTRACTOR
BOOZ ALLEN HAMILTON INC.

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	withholding of fee (total fee for Base Period is (b)(4) . There are no changes to the terms and conditions of the contract as a result of this modification. Period of Performance: 09/29/2010 to 09/28/2011				

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT		1. CONTRACT D CODE		PAGE OF PAGES 1 3	
2. AMENDMENT/MODIFICATION NO. 000002		3. EFFECTIVE DATE 12/21/2010		4. REQUISITION/PURCHASE REQ. NO.	
5. PROJECT NO. (If applicable)		6. ISSUED BY CODE 00600		7. ADM NISTERED BY (If other than Item 6) CODE EDAY	
Social Security Administration Office of Acquisition and Grants 1st Floor - Rear Entrance 7111 Security Boulevard Baltimore MD 21244-1811		ERICA DAY (410) 965-9512			
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) BOOZ ALLEN HAMILTON INC. Attn: Natalie McDonald 8283 GREENSBORO DRIVE MCLEAN VA 221023838		(x)		9A. AMENDMENT OF SOLICITATION NO.	
				9B. DATED (SEE ITEM 11)	
		x		10A. MODIFICATION OF CONTRACT/ORDER NO. SS00-10-60103	
				10B. DATED (SEE ITEM 13) 09/29/2010	
CODE		FACILITY CODE			

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Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNT NG AND APPROPRIATION DATA (If required)

See Schedule

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
X	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
	D. OTHER (Specify type of modification and authority)

E. IMPORTANT Contractor ☒ is not, ☐ is required to sign this document and return _____ 0 _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

DUNS Number: 006928857

Beneficiary Access and Support Services (BASS) contractor.

The purpose of this administrative modification is to:

1) Provide more detailed information for the invoicing instructions as it relates to the Fixed Fee. Fixed fee should be billed at the agreed upon rate **(b)(4)**, based on costs incurred for the month, up to the 15% yearly withholding amount. Final 15% of fee will be paid with final invoice of the contract year.

Continued ...

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) ERICA N. DAY	
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)	15C. DATE SIGNED	16C. DATE SIGNED 12/21/2010	

CONTINUATION SHEET

REFERENCE NO. OF DOCUMENT BEING CONTINUED

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NAME OF OFFEROR OR CONTRACTOR

BOOZ ALLEN HAMILTON INC.

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	2) Change the Contracting Officer's Technical Representative (COTR) and Alternate COTR that appear in section G-5 of the contract. See yellow highlighted sections of the attached for exact changes. There are no changes to the terms and conditions of the contract as a result of this modification. Period of Performance: 09/29/2010 to 09/28/2011				

**G-5 DESIGNATION OF GOVERNMENT CONTRACTING OFFICER'S
TECHNICAL REPRESENTATIVE**

- (a) The individual(s) named below is hereby designated as the Government Contracting Officer's Technical Representative (COTR). If an alternate COTR is also listed below, that person will serve in the COTR's stead when the COTR is unavailable. The COTR is responsible for the technical administration of this contract, [in accordance with the provisions of the clause included herein entitled, "Technical Direction."]

NAME**ADDRESS****COTR**

Mark Green	2410 Operations Bldg
410-965-9852	6401 Security Blvd
Mark.Green@ssa.gov	Baltimore, MD 21235

Alternate COTR

Laura York	176 Operations Bldg
410-966-1177	6401 Security Blvd
Laura.York@ssa.gov	Baltimore, MD 21235

The COTR, or his/her authorized representative, shall be responsible for coordinating with the contractor the technical aspects of the contract. The COTR is not authorized to make any changes, which affect the contract amount, terms or conditions. The contracting officer is the only person with the authority to act as agent of the Government under this contract. Only the contracting officer has authority to: (1) direct or negotiate any changes in the Statement of Work; (2) modify or extend the period of performance; (3) change the delivery schedule; (4) authorize reimbursement to the contractor any costs incurred during the performance of this contract; or (5) otherwise change any terms and conditions of this contract.

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT		1. CONTRACT D CODE		PAGE OF PAGES 1 4	
2. AMENDMENT/MODIFICATION NO. 000003		3. EFFECTIVE DATE 01/12/2011		4. REQUISITION/PURCHASE REQ. NO.	
5. PROJECT NO. (If applicable)		6. ISSUED BY CODE 00600		7. ADMINISTERED BY (If other than Item 6) CODE ERICA DAY (410) 965-9512	
Social Security Administration Office of Acquisition and Grants 1st Floor - Rear Entrance 7111 Security Boulevard Baltimore MD 21244-1811					
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) BOOZ ALLEN HAMILTON INC. Attn: Natalie McDonald 8283 GREENSBORO DRIVE MCLEAN VA 221023838		(x)		9A. AMENDMENT OF SOLICITATION NO.	
				9B. DATED (SEE ITEM 11)	
		x		10A. MODIFICATION OF CONTRACT/ORDER NO. SS00-10-60103	
				10B. DATED (SEE ITEM 13) 09/29/2010	
CODE		FACILITY CODE			

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

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Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

See Schedule

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
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	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
	D. OTHER (Specify type of modification and authority)

E. IMPORTANT Contractor ☒ is not, ☐ is required to sign this document and return _____ 0 _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

DUNS Number: 006928857

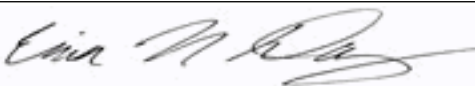
Beneficiary Access and Support Services (BASS) contractor.

The purpose of this administrative modification is to:

- 1) Correct the G&A ceiling rates listed in section B-8 of the contract.
- 2) Change the Deputy Project Director listed in section G-2 of the contract.

Continued ...

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) ERICA N. DAY	
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)	15C. DATE SIGNED	16B. DATE SIGNED 	16C. DATE SIGNED 01/12/2011

NAME OF OFFEROR OR CONTRACTOR
 BOOZ ALLEN HAMILTON INC.

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	See yellow highlighted sections of the attached for exact changes. There are no changes to the terms and conditions of the contract as a result of this modification. Period of Performance: 09/29/2010 to 09/28/2011				

B-8 INDIRECT COST RATES

Final indirect cost rates shall not exceed the following *ceiling* rates:

COST CENTER 3 INDIRECT COST	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
Fringe Benefits	(b)(4)				
Labor Overhead					
G&A					
Subcontract/Consultant Handling					

COST CENTER 13 INDIRECT COST	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
Fringe Benefits	(b)(4)				
Labor Overhead					
G&A					
Subcontract/Consultant Handling					

	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
COST CENTER 14 INDIRECT COST	RATE	RATE	RATE	RATE	RATE
Fringe Benefits	(b)(4)				
Labor Overhead					
G&A					
Subcontract/Consultant Handling					

	YEAR 1	YEAR 2	YEAR 3	YEAR 4	YEAR 5
COST CENTER 17 INDIRECT COST	RATE	RATE	RATE	RATE	RATE
Fringe Benefits	(b)(4)				
Labor Overhead					
G&A					
Subcontract/Consultant Handling					

G-2 PROJECT DIRECTOR AND KEY PERSONNEL

- (a) The performance of the work required by this contract shall be conducted under the direction of Melanie Porter. The Government reserves the right to disapprove any successor to this individual.
- (b) The key personnel under this contract shall be:

Melanie Porter – Project Director

Patricia Van Nelson – Deputy Project Director

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT		1. CONTRACT D CODE		PAGE OF PAGES 1 3	
2. AMENDMENT/MODIFICATION NO. 000004		3. EFFECTIVE DATE 07/22/2011		4. REQUISITION/PURCHASE REQ. NO.	
6. ISSUED BY Social Security Administration Office of Acquisition and Grants 1st Floor - Rear Entrance 7111 Security Boulevard Baltimore MD 21244-1811		CODE 00600		5. PROJECT NO. (If applicable)	
		7. ADM NISTERED BY (If other than Item 6) ERICA DAY (410) 965-9512		CODE EDAY	
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) BOOZ ALLEN HAMILTON INC. Attn: Mary Beth Cullen 8283 GREENSBORO DRIVE MCLEAN VA 221023838		(x)		9A. AMENDMENT OF SOLICITATION NO.	
				9B. DATED (SEE ITEM 11)	
		x		10A. MODIFICATION OF CONTRACT/ORDER NO. SS00-10-60103	
				10B. DATED (SEE ITEM 13) 09/29/2010	
CODE		FACILITY CODE			

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	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
	D. OTHER (Specify type of modification and authority)

E. IMPORTANT Contractor ☒ is not. ☐ is required to sign this document and return _____ 0 _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

DUNS Number: 006928857

Beneficiary Access and Support Services (BASS) contractor.

The purpose of this administrative modification is to:

1) Change the Contracts Administrator listed in section G-4 of the contract.

2) Change the Contracting Officer's Technical Representative (COTR) and Alternate COTR listed in Section G-5 of the contract.

Continued ...

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) ERICA N. DAY	
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)	15C. DATE SIGNED	16C. DATE SIGNED 07/22/2011	

CONTINUATION SHEET

REFERENCE NO. OF DOCUMENT BEING CONTINUED

SS00-10-60103/000004

PAGE

OF

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3

NAME OF OFFEROR OR CONTRACTOR

BOOZ ALLEN HAMILTON INC.

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	See yellow highlighted sections of the attached for exact changes. There are no changes to the terms and conditions of the contract as a result of this modification. Period of Performance: 09/29/2010 to 09/28/2011				

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT				1. CONTRACT D CODE		PAGE OF PAGES 1 7	
2. AMENDMENT/MODIFICATION NO. 000005		3. EFFECTIVE DATE 09/29/2011		4. REQUISITION/PURCHASE REQ. NO. K501-11-1006		5. PROJECT NO. (If applicable)	
6. ISSUED BY Social Security Administration Office of Acquisition and Grants 1st Floor - Rear Entrance 7111 Security Boulevard Baltimore MD 21244-1811		CODE 00600		7. ADMINISTERED BY (If other than Item 6) ERICA DAY (410) 965-9512		CODE EDAY	
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) BOOZ ALLEN HAMILTON INC. Attn: Mary Beth Cullen 8283 GREENSBORO DRIVE MCLEAN VA 221023838				(x)		9A. AMENDMENT OF SOLICITATION NO.	
						9B. DATED (SEE ITEM 11)	
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CODE		FACILITY CODE					
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12. ACCOUNT NG AND APPROPRIATION DATA (If required) 400K501/2011/2511/2818704/K501-11-1006/				Net Increase:		\$8,070,326.00	
13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.							
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	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:						
X	D. OTHER (Specify type of modification and authority) Unilateral - FAR 52.217-9, Option to Extend the Term of the Contract (March 2000)						
E. IMPORTANT Contractor ☒ is not. ☐ is required to sign this document and return _____ 0 _____ copies to the issuing office.							
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.) DUNS Number: 006928857 Beneficiary Access and Support Services (BASS) contractor. The purpose of this modification is to: 1) Exercise and Fund Option Period One for 12 month period through 09/28/2012; 2) Change the COTR from Mark Green to Laura York and change the Alternate COTR from Laura York to Mark Green in Contract Sections E-2, F-2, G-5 and H-11; 3) Change the Contractor's Representative from Mary Beth Cullen to Jordan Green in Contract Section G-4; and 4) Increase the Total Amount of Contract in Block 15G on the SF 26 for the contract award Continued ... Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.							
15A. NAME AND TITLE OF SIGNER (Type or print)				16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) CHRISTOPHER BRENNAN			
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)		15C. DATE SIGNED		16C. DATE SIGNED 09/01/2011			

CONTINUATION SHEET

REFERENCE NO. OF DOCUMENT BEING CONTINUED
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2 7NAME OF OFFEROR OR CONTRACTOR
BOOZ ALLEN HAMILTON INC.

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
0002	from \$8,497,800.00 by \$8,070,326.00 to \$16,568,126.00. Accordingly, the following changes are made to the contract: (See yellow highlighted sections in the attached continuation pages 3 through 7) Period of Performance: 09/29/2010 to 09/28/2012 Change Item 0002 to read as follows (amount shown is the obligated amount): Option Period One - Period of Performance 9/29/2011 - 9/28/2012 Obligated Amount: \$8,070,326.00 Award Type: Cost-plus-fixed-fee Total Estimated Cost: (b)(4) Fixed Fee: (b)(4) Term Form Period of Performance: 09/29/2011 to 09/28/2012				8,070,326.00

SECTION B-SUPPLIES OR SERVICES AND PRICES/COSTS, B-4 ESTIMATED COST AND FEE-INCOMPLETION CONTRACT, paragraphs b and c are changed to read as follows to (1) increase the amount of incremental funding from \$8,497,800.00 by \$8,070,326.00 to \$16,568.126.00; and (2) extend the performance timeframe that funding will cover by 12-months.

B-4 ESTIMATED COST AND FEE - COMPLETION CONTRACT

- (a) It is estimated that the total cost to the Government for full performance of this contract will be \$41,763,065.00, of which the sum of (b)(4) represents the estimated reimbursable costs and (b)(4) represents the fixed fee.
- (b) Total funds currently available for payment and allotted to this contract are (b)(4) of which (b)(4) represents the estimated reimbursable costs and (b)(4) represents the fixed fee. For further provisions on funding, see the Limitation of Funds clause (FAR 52.232-22).
- (c) It is estimated that the amount currently allotted will cover performance through September 28, 2012.
- (d) The Contracting Officer may allot additional funds to the contract without the concurrence of the Contractor.

	Option Year 1	Option Year 2	Option Year 3	Option Year 4
Total Cost	(b)(4)			
Total Fixed Fee				
Total Cost + Fixed Fee	\$8,070,326	\$8,230,950	\$8,396,182	\$8,567,807

SECTION E-INSPECTION AND ACCEPTANCE, E-2 INSPECTION AND ACCEPTANCE, paragraph b is changed to replace the COTR, Theola Snowden with Laura York.

E-2 INSPECTION AND ACCEPTANCE

- (a) The contracting officer or the duly authorized representative will perform inspection and acceptance of materials and services to be provided.
- (b) For the purpose of this section, Laura York, is the authorized representative of the contracting officer.
- (c) Inspection and acceptance will be performed at SSA's Headquarters, Woodlawn, MD and other sites as applicable.

SECTION F, DELIVERIES OR PERFORMANCE, F-2 DELIVERIES OR PERFORMANCE, has been updated to show a change in the COTR from Theola Snowden to Laura York.

F-2 DELIVERIES OR PERFORMANCE

The work to be performed hereunder shall be completed by not later than 60 months after the date of contract award. The work is to be accomplished by phases. The following are the estimated periods of performance of each phase:

Period	Description	Completion Date
Base year	Implementation of BASS Services	12 months from date of contract award
Option 1	Continuation of the BASS Services	24 months from date of contract award
Option 2	Continuation of the BASS Services	36 months from date of contract award
Option 3	Continuation of the BASS Services	48 months from date of contract award
Option 4	Continuation of the BASS Services	60 months from date of contract award

The following items shall be delivered to the Contracting Officers Technical Representative (COTR) (FOB Destination):

Name: **Laura York**

Address: **Social Security Administration**
176 Operations Bldg
6401 Security Blvd
Baltimore, MD 21235

Email: Laura.York@ss.gov

An electronic copy in the appropriate Microsoft Office format, shall be sent to the COTR and the contracting officer (additional names will be added at a later date). Items sent monthly shall be within three days after the end of the monthly timeframe unless otherwise indicated. Days listed on this schedule are calendar days unless otherwise indicated.

Item #	TASK	DESCRIPTION	DUE DATE
1	1.A	Arrange orientation meeting with COTR	Not later than (NLT) three (3) days following contract award
2	2.A	Final Start-up Plan	NLT 7 days after

			orientation
3	2.D	Prepare Start-Up Status Reports	Weekly, following SSA approval of deliverable #2
4	2.E	Certify completion of start-up activities	30 days after award
5	3.A	Contact COTR to arrange SSA systems orientation meeting and review systems file access retrieval	To be held in conjunction with Task 1.A
6	3.A-B	Be capable of TPDOCM access/utilization and become familiar with management information data elements as described under this section	30 days after award
7	3.E	Establish stand-alone systems as adjunct to TPDOCM	30 days after award
8	3.H.2	Designate Chief Security Officer	7 days after award
9	4	Certify completion of the establishment of the toll-free telephone call center process	30 days after award
10	5	Establish beneficiary support web site	30 days after award
11	8.A	Provide database of current ENs	30 days after award and ongoing
12	8.D	Determine 90 percent of beneficiaries' needs after ticket unassignment	NLT 10 days after receiving information
13	8.E	Determine 90 percent of beneficiaries' needs after VR case closure	NLT 10 days after receiving information
14	9, 10	Draft OMB clearance package, including survey instrument	90 days after award
15	10	Revised OMB clearance package	60 days of receiving OMB comments
16	9	Conduct beneficiary satisfaction survey	3 months of receiving OMB approval
17	11	Dispute resolution	Initial contacts with disputing parties shall be made within 1 business day of receipt of dispute
17	11	Dispute resolution	Refer all disputes to SSA within 1 business day of determination that they cannot be resolved
18	12	Response to sensitive inquiries	Notify the COTR

			immediately by telephone and within 1 business day followed up electronically
19	9	Submit survey analysis	60 days following each survey
20	13.D.1	Monthly contract progress reports	Monthly, NLT 14 workdays following last day of month
21	13.D.2	Annual Report	Annually, NLT 30 days following period of performance
22	14	Facilitation of audits	As requested

SECTION G, CONTRACT ADMINISTRATION DATA, G-4 CONTRACT ADMINISTRATION has been updated to change the Contractor's Representative, from Mary Beth Cullen to Jordan Green. G-5 DESIGNATION OF GOVERNMENT CONTRACTING OFFICER'S TECHNICAL REPRESENTATIVE has been updated to change the COTR from Mark Green to Laura York and the Alt. COTR from Laura York to Mark Green.

G-4 CONTRACT ADMINISTRATION

The contractor's representative responsible for handling contract administration is:

Jordan Green, Contracts Administrator

One Preserve Parkway, Suite 200
Rockville, MD 20852

Phone: 301-444-4271

Email: jordan_green@bah.com

G-5 DESIGNATION OF GOVERNMENT CONTRACTING OFFICER'S TECHNICAL REPRESENTATIVE

- (a) The individual(s) named below is hereby designated as the Government Contracting Officer's Technical Representative (COTR). If an alternate COTR is also listed below, that person will serve in the COTR's stead when the COTR is unavailable. The COTR is responsible for the technical administration of this contract, [in accordance with the provisions of the clause included herein entitled, "Technical Direction."]

NAME

ADDRESS

COTR

Laura York
410-966-1177
Laura.York@ssa.gov

176 Operations Bldg
6401 Security Blvd
Baltimore, MD 21235

Alternate COTR**Mark Green**

410-965-9852

Mark.Green@ssa.gov

2410 Operations Bldg

6401 Security Blvd

Baltimore, MD 21235

The COTR, or his/her authorized representative, shall be responsible for coordinating with the contractor the technical aspects of the contract. The COTR is not authorized to make any changes, which affect the contract amount, terms or conditions. The contracting officer is the only person with the authority to act as agent of the Government under this contract. Only the contracting officer has authority to: (1) direct or negotiate any changes in the Statement of Work; (2) modify or extend the period of performance; (3) change the delivery schedule; (4) authorize reimbursement to the contractor any costs incurred during the performance of this contract; or (5) otherwise change any terms and conditions of this contract.

SECTION H, SPECIAL CONTRACT REQUIREMENTS, SECTION H-11 PROTECTIN AND REPORTING THE LOSS OF PERSONALLY IDENTIFIABLE INFORMATION RESPONSIBILITIES CONCERNING INDIVIDUAL EMPLOYEES (DEC2008) has been updated to change the primary SSA contract from Theola Snowden to Laura York and to change the First Alternate from Laura York to Mark Green.

H-11 PROTECTING AND REPORTING THE LOSS OF PERSONALLY IDENTIFIABLE INFORMATION: RESPONSIBILITIES CONCERNING INDIVIDUAL EMPLOYEES (DEC 2008)

- (1) My primary SSA contact for reporting the loss, compromise, or potential compromise of PII is: **Laura York**

Contracting Officer's Technical Representative

Laura.York@ssa.gov

410-966-1177

The alternates to this primary contact are as follows:

First Alternate: **Mark Green**

Alternate Contracting Officer's Technical Representative

Mark.Green@ssa.gov

410-965-9852

Second Alternate: **Erica Day**

Contract Specialist

Erica.Day@ssa.gov

410-965-9512

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT		1. CONTRACT D CODE		PAGE OF PAGES 1 1	
2. AMENDMENT/MODIFICATION NO. 000006		3. EFFECTIVE DATE 12/13/2011		4. REQUISITION/PURCHASE REQ. NO.	
6. ISSUED BY Social Security Administration Office of Acquisition and Grants 1st Floor - Rear Entrance 7111 Security Boulevard Baltimore MD 21244-1811		CODE 00600		5. PROJECT NO. (If applicable)	
		7. ADMINISTERED BY (If other than Item 6) ERICA DAY (410) 965-9512		CODE EDAY	
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) BOOZ ALLEN HAMILTON INC. Attn: JORDAN GREEN 8283 GREENSBORO DRIVE MCLEAN VA 221023838		(x)		9A. AMENDMENT OF SOLICITATION NO.	
				9B. DATED (SEE ITEM 11)	
		x		10A. MODIFICATION OF CONTRACT/ORDER NO. SS00-10-60103	
				10B. DATED (SEE ITEM 13) 09/29/2010	
CODE		FACILITY CODE			

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

- ☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended ☐ is not extended.
Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

See Schedule

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
X	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
	D. OTHER (Specify type of modification and authority)

E. IMPORTANT Contractor ☒ is not. ☐ is required to sign this document and return _____ 0 _____ copies to the issuing office.**14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)**

DUNS Number: 006928857

Beneficiary Access and Support Services (BASS) contractor.

This administrative modification is make corrections in the agency's contract management system only. There are no changes to the terms and conditions of the contract.

Period of Performance: 09/29/2010 to 09/28/2012

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) ERICA N. DAY	
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)	15C. DATE SIGNED	16C. DATE SIGNED 12/13/2011	

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT		1. CONTRACT D CODE		PAGE OF PAGES 1 2	
2. AMENDMENT/MODIFICATION NO. 000007		3. EFFECTIVE DATE See Block 16C		4. REQUISITION/PURCHASE REQ. NO.	
6. ISSUED BY Social Security Administration Office of Acquisition and Grants 1st Floor - Rear Entrance 7111 Security Boulevard Baltimore MD 21244-1811		CODE 00600		5. PROJECT NO. (If applicable)	
		7. ADMINISTERED BY (If other than Item 6) ERICA DAY (410) 965-9512		CODE EDAY	
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) BOOZ ALLEN HAMILTON INC. Attn: JORDAN GREEN 8283 GREENSBORO DRIVE MCLEAN VA 221023838		(x)		9A. AMENDMENT OF SOLICITATION NO.	
				9B. DATED (SEE ITEM 11)	
		x		10A. MODIFICATION OF CONTRACT/ORDER NO. SS00-10-60103	
				10B. DATED (SEE ITEM 13) 09/29/2010	
CODE		FACILITY CODE			

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

- ☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended ☐ is not extended.
Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

See Schedule

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
X	D. OTHER (Specify type of modification and authority) FAR 52.243-2 Changes - Cost Reimbursement--Alt I

E. IMPORTANT Contractor ☐ is not. ☒ is required to sign this document and return 1 copies to the issuing office.**14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)**

DUNS Number: 006928857

Beneficiary Access and Support Services (BASS) contractor.

The purpose of this modification is to incorporate a revised Statement of Work into the contract.

See continuation pages with yellow highlight to identify specific changes.

Period of Performance: 09/29/2010 to 09/28/2012

Continued ...

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) ERICA N. DAY	
15B. CONTRACTOR/OFFEROR Contractor Signature Received (Signature of person authorized to sign)	15C. DATE SIGNED 03/16/2012	16C. DATE SIGNED 03/16/2012	

CONTINUATION SHEET

REFERENCE NO. OF DOCUMENT BEING CONTINUED

SS00-10-60103/000007

PAGE

OF

2

2

NAME OF OFFEROR OR CONTRACTOR

BOOZ ALLEN HAMILTON INC.

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	There are no other changes to the terms and conditions of the contract as a result of this modification.				

SECTION C

DESCRIPTION/SPECIFICATIONS/WORK STATEMENT

C-1 PROJECT BACKGROUND

C-2 PROJECT OBJECTIVES AND DESCRIPTION

C-3 SERVICES TO BE PERFORMED

C-1 PROJECT BACKGROUND

A. INTRODUCTION AND PURPOSE

The Ticket to Work and Work Incentives Improvement Act of 1999 (Public Law 106-170), added section 1148 to the Social Security Act (The Act). Section 1148 established, among other things, the Ticket-to-Work and Self-Sufficiency Program (Ticket Program). The Ticket Program provides Social Security beneficiaries with disabilities more choices for receiving employment services and increases provider incentives to serve beneficiaries with disabilities who wish to maximize their economic self-sufficiency through work opportunities.

The Social Security Administration (SSA) proposes to contract with a vendor to serve as the Ticket Program Manager for Beneficiary Access and Support Services (BASS), who will be responsible for providing support for beneficiaries to encourage and facilitate beneficiary participation in the Ticket Program.

B. BACKGROUND

1. Prior to the Ticket - Social Security Disability Insurance (SSDI) and Supplemental Security Income (SSI) benefits are designed to provide a basic level of support for individuals with disabilities whose earning ability is restricted due to their impairments. Prior to the Ticket legislation, SSA referred SSDI and SSI beneficiaries with disabilities, who were believed to be good candidates for employment-related services, to State Vocational Rehabilitation Agencies (SVRA). If the beneficiaries obtained employment and attained certain work and earnings levels, SSA reimbursed the SVRAs for their costs, under the SSA's VR reimbursement programs.
2. Ticket Legislation - Public Law 106-170 addressed a number of barriers that disability beneficiaries encounter in obtaining jobs and continuing to work by:
 - Expanding the availability of health care services and coverage;
 - Eliminating certain work disincentives;
 - Providing for enhanced benefits planning and assistance from other public and private sources; and
 - Creating the Ticket-to-Work and Self-Sufficiency Program.

It is the Ticket Program and the provisions set forth in the Act at Section 1148 that define the scope of the requirements under this contract.

3. The Ticket Program - The Ticket Program provides disability beneficiaries with more choices for receiving employment services and increasing provider incentives to serve these individuals. Under the Ticket Program, SSA is directed to provide disability beneficiaries with a Ticket they may use to obtain VR services, employment services, and/or other support services from an Employment Network (EN) of their choice and to establish agreements with ENs to provide such services. The Ticket Program was fully implemented in September 2004, and to date Tickets have been mailed to more than 16 million eligible beneficiaries with disabilities in all 50 states, the District of Columbia, and the U.S. territories. Approximately 11.7 beneficiaries currently are eligible to participate in the Ticket Program, and an average of 89,000 Tickets are mailed to new beneficiaries each month upon entering the disability roles.

4. Components of the Ticket Program

- Consumer Options for Employment Services - The Ticket enables an SSDI and SSI beneficiary to go to either a participating public or private EN. The process of choosing an EN is called assigning tickets (Ticket assignment). Beneficiaries may seek services from State VR agencies that either act as ENs or provide services to SSDI and SSI beneficiaries with disabilities under the traditional VR reimbursement model. If the VR agency elects to provide services under the traditional VR reimbursement model, the beneficiary does not assign the Ticket to the SVRA, although the Ticket is considered “in use” with the SVRA for program purposes (see below). A beneficiary may choose to receive up-front services from a SVRA, and then choose to receive continuing services from an EN.
- Increased Choices for Employment Services--Definition of Employment Network
An EN is an organizational entity (State or local, public or private) that enters into a contract with SSA to assume responsibility for the coordination and delivery of appropriate employment services, VR services, and/or other support services under the Ticket Program to beneficiaries who have assigned Tickets to the EN. SVRAs also may elect to function as an EN under the Ticket Program.

An EN may be either a single provider of such services or an association of providers organized so as to combine their resources into a single entity. An EN may provide services necessary to prepare and place beneficiaries in employment, either directly or by entering into agreements with other providers of such services.

Under the Ticket Program, SSA may issue a Ticket to a beneficiary, who in turn may “assign” that Ticket to any EN of the beneficiary’s choice that is serving under the Ticket Program and is willing to accept the “assignment”. ENs may select the beneficiaries with whom they will work/accept assignment of Tickets.

- EN Options for Payment - ENs who accept tickets from a beneficiaries must select one of

the two payment plans, as follows:

- Outcome payment system (Outcome): An outcome payment is an amount up to 67 percent of the average SSDI benefit for every month up to 36 months that the SSDI or concurrently entitled beneficiary is not due cash benefits because of his or her work or earnings, or an amount up to 67 percent of the average SSI monthly benefit for every month up to 60 months that the SSI beneficiary is not due cash benefits because of his or her work or earnings; or
 - Outcome-milestone payment system (Milestone): This system is designed to provide two (2) types of payments. Milestone payments are made in two (2) phases. In Phase 1, a milestone payment may be made as a result of a beneficiary's achievement of up to four (4) employment-related goals within an 18-month period. In Phase 2, SSA may pay up to 11 milestone payments as a result of an SSDI beneficiary's work activity, and up to 18 milestone payments as a result of an SSI beneficiary's work activity. Thereafter, outcome payments may be made as described above, but they are reduced based on the number of milestones paid.
- Suspension of Continuing Disability Reviews (CDRs) - By law, SSA must periodically reassess all beneficiaries receiving benefits based on disability to determine if they continue to meet medical requirements for disability benefits (i.e., if they continue to be so impaired that the beneficiaries would reasonably be considered to be unable to work). If after a medical CDR SSA determines that a beneficiary has had medical improvement in their impairments and that the medical improvement is related to the ability to work at the substantial gainful activity (SGA) level, then SSA must cease the beneficiary's disability cash benefits. When a beneficiary is "using the ticket" (the Ticket is "in use"), SSA defers any scheduled medical CDR that has not begun before the beneficiary began to use the Ticket. The Ticket is considered to be "in use" if assigned to an EN or to an SVRA being paid as an EN, or "in-use SVR" if the beneficiary is working with an SVRA under traditional cost reimbursement.
 - Role of the Program Manager – Public Law 106-170 authorizes the Commissioner of the Social Security Administration to enter into an agreement(s) with a Program Manager(s) (PM) to assist in administering the Ticket Program. While the PM may be tasked with a wide range of duties, the following four responsibilities are identified specifically in the law: recruitment and monitoring of ENs, ensuring the availability of adequate EN services to beneficiaries, ensuring the availability of a sufficient number of ENs as to be reasonably accessible to beneficiaries and facilitation of beneficiary access to ENs. The PM is precluded from direct participation in the delivery of employment services, VR services or other support services to beneficiaries in the service area covered by the PM's agreement. In addition, the PM shall not hold a financial interest in an EN or service provider that provides services in a geographic area covered under the PM's agreement.
5. Ticket Program Support Contractors – In 2005, SSA awarded contracts to two PMs to assist in administering the Ticket Program. On September 29, 2005, SSA awarded a contract to an Operations Support Manager (OSM) to provide a wide variety of EN support services, as well as administration of a call center for public inquiries. On November 30, 2005, SSA

awarded a contract to a PM for Recruitment and Outreach (PMRO) to provide a wide variety of services related to EN recruitment, beneficiary outreach, and facilitation of beneficiary access to ENs.

SSA again intends to award two PM contracts. The new OSM, while retaining responsibility for EN support, will have the added responsibility for recruiting ENs, but will no longer manage a public call center. The other PM will be called the Beneficiary Access and Support Services (BASS). The BASS will no longer have responsibility for EN recruitment, but will continue to have responsibility for beneficiary outreach and will assume responsibility for the public call center operations. While the two PMs will have discrete functions, they will work together closely, through SSA, to ensure that beneficiaries have the greatest possible access to ENs that are able to accept their Tickets and provide services that lead to sustained work efforts.

NOTE: In September, 2009, SSA modified Task 4 of the current OSM contract to add the Work Incentives Information and Referral Center (WIIRC), a special component of the call center. WIIRC staff are expected to provide beneficiaries with basic information about SSA's work incentives, make appropriate referrals to SSA's Work Incentives Planning and Assistance (WIPA) projects, which includes completing all required fields in the WIPA data base, and assisting all beneficiaries whose Tickets have been unassigned for any reason. WIIRC staff receive special training to conduct these duties. Task 4 of this SOW describes a call center that expands the WIIRC duties to all call center staff.

SSA will provide the PM contractors the necessary access to the Ticket Program Data Operation Center Manager (TPDOCM), along with any technical assistance required for system access and utilization, directly or through the TPDOCM contractor.

C-2 PROJECT OBJECTIVES AND DESCRIPTION

Securing the services of a BASS will enable SSA to meet the objectives of the Ticket Program as summarized below:

1. Conduct Outreach to Beneficiaries

The BASS shall implement and manage an ongoing, nationwide effort to Ticket-eligible beneficiaries to educate them on the benefits of participating in the Ticket Program.

2. Facilitate Beneficiary Access to ENs.

The BASS shall assist SSA in developing and executing strategies to facilitate access by Ticket-eligible beneficiaries to ENs capable and willing to serve them.

3. Ensure Timely and Accurate Communication

The BASS shall assist SSA by operating a call center with knowledgeable staff, and by maintaining a web site that will provide program-related information and a platform for beneficiaries to post and read comments about the Ticket Program.

C-3 SERVICES TO BE PERFORMED

The specific tasks enumerated below represent those specific contract services for which the BASS is responsible. An outline of the deliverables associated with each of these tasks is found in Section F, Deliveries or Performance.

- Task 1. Contractor Orientation
- Task 2. Start-Up Plan
- Task 3. System Access and Utilization
- Task 4. Call Center Operations (including Work Incentives and Information Referral Center)
- Task 5. Beneficiary Support Web Site
- Task 6. Beneficiary Outreach
- Task 7. Support for Work Incentives Seminar (WISE) **Webinars**
- Task 8. Facilitating Beneficiary Access to Employment Networks
- Task 9. Beneficiary Satisfaction Surveys
- Task 10. Prepare Office of Management and Budget Clearance Package
- Task 11. Beneficiary Dispute Resolution
- Task 12. Response to Sensitive Inquiries
- Task 13. Management Information and Progress Reports
- Task 14. Facilitation of Audits
- Task 15. Periodic Meetings
- Task 16. Contractor Coordination

TASK 1. CONTRACTOR ORIENTATION

A. The BASS shall contact the Contracting Officer's Technical Representative (COTR) no later than three calendar days following contract award to arrange an orientation by appropriate Social Security personnel at Social Security Administration Headquarters in Baltimore, MD. This orientation will include:

- an overview of the Ticket Program;
- a thorough discussion of contract requirements and expectations;
- contract start-up activities;
- access to and utilization of Ticket Program systems and data bases; and
- relationship/coordination with other Ticket Program support contractors, including assumption of any transitional requirements, as necessary.

B. The BASS shall be prepared to discuss in detail project start-up activities to facilitate the **immediate and effective** implementation and administration of this contract, including the following:

- acquiring necessary facilities and equipment;

- recruiting, hiring, and training staff;
- establishing the necessary systems access and utilization capabilities;
- planning for overall project management (including coordinating activities with SSA and/or the TPDOCM contractor, the OSM, and other program contractors);
- identifying key initiatives and project milestones; and
- citing perceived problems or concerns and their proposed resolutions.

TASK 2. START-UP PLAN

The purpose of this task is for the BASS to finalize the contract start-up plan submitted as part of the BASS's technical proposal.

A. Final Start-Up Plan

The BASS shall submit the final start-up plan to the COTR within the timeframes stated in Section F, Deliveries or Performance. The start-up plan shall explain in detail the steps to be taken and corresponding milestones to be achieved by the BASS to:

- Become thoroughly familiar with information technology systems, data bases, and data elements required to support Ticket Program recruitment and outreach activities.
- Acquire a full understanding of the integral relationship between the information technology system supports cited above and the requirements of this solicitation.
- Acquire a full understanding of the relationships between the OSM, BASS, SSA, the TPDOCM contractor, as well as other program contractors, and the importance of these relationships in accomplishing the requirements of this solicitation.
- Establish a stand-alone system/data base(s) necessary to input, process, and report management information data not captured in the TPDOCM.
- Establish connectivity with the TPDOCM system and any interface between the BASS stand-alone system/data base(s) and the TPDOCM system, as appropriate.
- Test, validate, and verify BASS connectivity with the TPDOCM system, functionality of the BASS stand-alone system/data bases(s), and any interface between the BASS stand-alone system/data bases(s) and the TPDOCM system, as appropriate.
- Establish system server capabilities to interact with a single or multiple data application environment (based on SSA-furnished specifications) for purposes of:
 - BASS staff access/retrieval of SSA-provided record data from a designated source (i.e., the OSM) and use that data in accordance with contract requirements;
 - BASS staff access/initiation/retrieval of electronic mail items transmitted from multiple sources (e.g., SSA, the OSM, and the general public); and
 - additional systems integration and data sharing capabilities identified by SSA as needed (e.g., management information reports).
- Designate a chief security official who will act as a liaison with the COTR and/or the TPDOCM contractor on systems security and privacy matters.
- Acquire a full understanding of Ticket Program business processes and SSA's beneficiary outreach goals.

- Build and staff an operation capable of designing and executing beneficiary outreach and access strategies in accordance with the requirements of this solicitation.

Upon approval of the plan by the COTR, the BASS shall begin work immediately on the start-up phase of this contract.

B. Ticket Program Business Process

The BASS shall become thoroughly knowledgeable of the Ticket Program Business Process and the relationships among the key Ticket Program players, including SSA, the other Ticket Program support contractors, ENs, State VR agencies, and Ticket-holders, to understand the environment in which the BASS will be functioning and the operations and system supports necessary to accomplish all operations support requirements under this solicitation.

C. Assumption of Current PM Duties

The current PM contracts expire on 09/28/2010 for OSM and 11/29/2010 for PMRO. Through that date the current PMRO will maintain and support all Ticket Program recruitment and outreach, including but not limited to EN recruitment, beneficiary outreach, and facilitating beneficiary access to ENs, while the BASS implements the start-up plan. SSA shall furnish the BASS all Government-owned documentation and data developed by the current PMs to implement and support the beneficiary access and support services described in Task 8 of this solicitation.

The BASS shall maintain communications with the COTR, the TPDOCM contractor, and the current OSM and PMRO to coordinate all start-up activities.

D. Start-Up Status Reports

The BASS shall prepare status reports that detail progress in all critical areas of the start-up plan. These reports shall be submitted to the COTR electronically on a weekly basis until all contract start-up activities are completed.

E. Completion of Start-up Activities

The BASS shall provide the COTR with verification in writing that all start-up activities have been completed as indicated in Section F (Deliveries or Performance). At that point the COTR shall direct the BASS to assume full responsibility for beneficiary access and support services activities.

Note: The COTR may conduct on-site visits of contractor facilities to review the status of the BASS's start-up activities and/or inspect operations readiness prior to final approval.

TASK 3. SYSTEM ACCESS AND UTILIZATION

Ticket Program operations are supported by two complimentary electronic information technology systems/data bases, a proprietary system managed by the TPDOCM and a system managed by SSA. The systems perform the following functions: (1) access and retrieve information from SSA control files, (2) update SSA files, (3) accept data entries, (4) generate program-related notices and (5) generate management information and program data reports.

The purpose of this task is to provide requirements for the BASS to become expert in, access, and utilize this system in the completion of the requirements of this solicitation, as well as establish other systems/data base(s) capable of collecting and reporting data not available through the TPDOCM.

A. Accessing the TPDOCM

At the time of the contractor orientation described in Task 1 (Contractor Orientation) above, the COTR will arrange a meeting with the BASS and the TPDOCM to orient appropriate BASS managerial, lead, and technical staff to the requirements and interactions necessary to successfully access and retrieve information from the Ticket Program system and data bases maintained by SSA and/or by the TPDOCM.

B. Familiarization with Management Information Data Elements in the TPDOCM

The BASS shall review and become thoroughly familiar with management information data elements found in SSA's and TPDOCM systems, which shall include, but not be limited to, the following data categories:

1. Comprehensive data relating to all ENs and SVRAs.
2. A **concatenated**, cleaned master EN/beneficiary Ticket assignment file. This file will include all active Ticket holders and their ENs as well as beneficiaries whose Tickets are in use with SVRAs.
3. Comprehensive Ticket tracking data, including payment data and assignment history.
4. EN data; e.g.:
 - Description of EN
 - State(s) EN is located
 - Address (addresses for multiple locations)
 - Primary contact person for data and information
 - Geographic area served including national coverage
 - Type of business (non-profit, for profit, State Agency or agency affiliated, etc.)
 - Services offered
 - Disability specialization, if any (i.e., particular types of disabilities that EN

targets; e.g., blind, deaf, mentally impaired, musculoskeletal impairments, traumatic brain injuries).

C. Modifications to the Ticket Program System and Data Bases

The BASS, as appropriate, shall alert the COTR and/or the TPDOCM of proposed modifications to the Ticket Program system and data bases that would improve the BASS's capability of performing the requirements of this solicitation. Such requests shall be in writing and provide a detailed justification for the proposed modification.

D. Connectivity with TPDOCM

The BASS shall work with SSA and the TPDOCM to insure connectivity with SSA and TPDOCM systems at the user end, including procuring necessary hardware and software.

E. Security Clearances

The BASS shall work through the COTR to obtain from SSA the necessary security clearances, profiles and access identifiers for designated contractor employees prior to accessing SSA and TPDOCM systems.

F. BASS Stand-Alone System/Database(s)

The BASS shall establish a stand-alone system/data base(s) necessary to enter, process, store, and report management information obtained from SSA and TPDOCM systems or from other sources as appropriate.

1. The BASS system/data base(s) shall be capable of capturing data in the following categories:

a. Beneficiary outreach, access and support services data as described in Tasks 6, 7, 8, and 9 below.

b. Beneficiary Communication

- Length of calls/email response preparation;
- Number of rings before answer;
- Number of calls received by automated message;
- Turnaround time to respond to automated message calls/inquiries; and
- Number of calls requiring foreign language and text services

c. Administrative data

--All general administrative data included in the Monthly Contract Progress Report; e.g.:

- invoices and budgets, travel expenses required under the contract;

- special studies and reports conducted under the contract; and
- responses to audits by the Office of the Inspector General (OIG) and/or the Government Accountability Office (GAO) or other contractor auditors.

--A comprehensive listing of all deliverables under this contract, delivery dates, the status of each deliverable, and information as to any alterations to the original delivery schedule in the contract.

d. Ad-hoc studies and reports

The BASS stand-alone system/data base(s) shall be capable through modification and/or increasing storage capacity of permitting collection, storage, and manipulation of new data elements and information with which to generate ad-hoc and periodic reports. The BASS shall alert the COTR of any requirements for generating ad hoc reports.

2. The BASS shall maintain backup system(s) to prevent data loss and system down time.

G. Integrity/Accuracy of Data

The BASS shall be responsible for ensuring the integrity/accuracy of any data input to the TPDOCM system and to the BASS's stand-alone system, and for resolving any erroneous data inputs and correcting any erroneous management information reports.

H. Ownership of Data

All data provided the BASS by SSA and/or the TPDOCM contractor, derived by the BASS from SSA data, and obtained by the BASS through performance of the requirements of this contract are the property of SSA.

I. Protecting SSA Information and Information Systems Security

1. The BASS shall meet all Government rules and regulations concerning the protection of confidential and personal information of beneficiaries and SSA's systems security.
2. The BASS shall designate a chief security official who will act as a liaison with the COTR and/or the TPDOCM contractor and the OSM on systems security and privacy matters.

J. Work Incentive Planning and Assistance (WIPA) Database for Beneficiary Referrals to WIPAs

The BASS shall be responsible for making referrals to WIPA project according to Task 4.G. Accordingly, the BASS shall be familiar with the WIPA program's electronic Efforts to Outcomes (ETO) database, specifically with reference to the Information and Referral (I&R) section.

TASK 4. CALL CENTER OPERATIONS

- A. The BASS shall establish and maintain a toll-free telephone number service to be marketed to prospective beneficiary users by SSA as the “SSA Ticket to Work **Helpline**” (**Helpline**). The purpose of this service shall be to:
- Assist beneficiaries in locating and assigning their Ticket to ENs who can provide services that lead to increased work activity and earnings;
 - Provide enhanced assistance to beneficiaries whose Tickets have been unassigned or who received services from an SVRA that has closed the case;
 - Respond to general inquiries relating to the Ticket Program and other resources for beneficiaries who are considering work;
 - Make appropriate referrals to WIPA projects; and
 - Provide basic information about all SSA disability work incentives, including a beneficiary’s rights and responsibilities.
- B. Under the current contract the OSM has the responsibility for maintaining the Ticket Program call center. The BASS will provide their plan for assuming this task while ensuring that there is no break in service.
- C. The toll-free service shall provide the following capabilities:
1. Operate from 8:00 a.m. to 8:00 p.m., Eastern Time, Monday through Friday of each week, excluding Federal holidays;
 2. Provide simultaneous service to multiple callers;
 3. Provide Spanish language service; and
 4. Provide Text Telephone Communication Service for the hearing and speech-impaired;
 5. Provide after-hours service via voicemail.
- D. The nature of inquiries and actions shall include, but not be limited to, the following topics.
1. Assisting beneficiaries in locating and assigning their Ticket to ENs.

The **Helpline** shall:

- a. As provided in Task 8, provide current information on EN availability and services (including requests for lists of ENs located in a geographic area and ENs specializing in or providing services for people with specific impairments; e.g., blind individuals);
- b. As provided in Task 8, assist all beneficiaries whose Tickets have been unassigned and all beneficiaries who received services from an SVRA, where the SVRA elected to receive payment under the cost reimbursement option and has closed the beneficiary’s case;

- c. Take appropriate action on requests for a “Ticket on Demand.” A Ticket-eligible beneficiary may request a Ticket on Demand in cases where he/she wants a paper ticket. In such instances, the beneficiary may contact the BASS Helpline to request a Ticket. The BASS shall immediately forward the beneficiary’s request to the OSM, which will consult SSA’s control file to confirm Ticket eligibility and then mail a Ticket to the beneficiary using a format prescribed by SSA;
 - d. Take appropriate and immediate action on questions from beneficiaries about Ticket status and Ticket assignments; and
 - e. Take appropriate action on questions from beneficiaries about Timely Progress Reviews. SSA periodically conducts medical reviews to determine if an individual continues to meet the medical requirements to collect disability. If the person does not continue to meet the medical requirements, SSA may stop the disability benefits. Beneficiaries who are participating in the Ticket Program will not undergo medical reviews as long as they are making “timely progress.” Periodically SSA, through the OSM, will conduct a Timely Progress Review for each beneficiary who is participating in the Ticket Program. The mailing associated with these reviews will generate calls to the Hotline, and the BASS shall immediately transfer such calls to the OSM.
2. Responding to general inquiries relating to the Ticket Program and other resources for beneficiaries who are considering work.

This shall include, but not be limited to:

- a. Basic information about the Ticket to Work Program and the resources available through the Program;
- b. Basic explanations of the impact of work on Social Security cash and related benefits;
- c. Information about reporting requirements, including telephone wage reporting, and procedures such as maintaining records of work activities and expenses;
- d. Information about basic rights of appeal;
- e. Information about the State VR process, and referrals as appropriate;
- f. Information about Protection and Advocacy for Beneficiaries of Social Security (PABSS) services, and referrals as appropriate;
- g. Referrals to organizations responsible for subsidized housing, Food Stamps, food banks, energy assistance, Medicaid and other benefits resources, as appropriate;
- h. Information about program-related activities (e.g., demonstration projects, outreach events); and

i. Information about other resources (e.g., disability program navigator in the Department of Labor's One-Stops under the Workforce Investment Act of 1998 and the Small Business Administration).

3. Making appropriate referrals to WIPA projects

a. The **Helpline** shall make referrals to WIPA projects serving all geographic areas via approved electronic media. This includes cases where the **Helpline** determines that a referral to a WIPA is appropriate based on an inquiry from a beneficiary, as well as cases where the beneficiary contacts a WIPA, which then refers the information to the **Helpline**. In making these referrals, the **Helpline** shall perform all I&R functions for all WIPA projects.

The **Helpline** shall ensure that all referrals to WIPA projects are appropriate; i.e., beneficiaries who desire a thorough analysis of the impact of work on their benefits in order to make full use of the services and supports available to them as they advance toward self-supporting employment. The **Helpline** shall function as an intermediary service and shall not be designed to replace WIPA services.

b. In making a referral, the **Helpline** shall:

- 1) Verify and relay electronically to the WIPA project selected beneficiary information available to the BASS from approved Ticket Program data bases;
- 2) Document a referral of a beneficiary to a WIPA by completing all required fields in the I&R section of the WIPA program's electronic ETO data base.

4. Providing basic information about all SSA work incentives, as follows:

a. Title II work incentives, including trial work period, substantial gainful activity (SGA) determinations, including impairment-related work expenses (IRWE) and subsidy deductions, extended period of eligibility, expedited reinstatement of benefits and reapplication for disability benefits;

b. Title XVI work incentives, including student earned income exclusion, earned income exclusion, IRWE, blind work expenses, continued Medicaid for people who work, property essential for self-support and an introduction to the Plan to Achieve Self-Support; and

c. Title XVIII work incentives, including extended Medicare coverage and Medicare for beneficiaries with disabilities who are working.

E. The **Helpline** shall be staffed by trained inquiry specialists capable of providing a wide range of information necessary to respond to general and specific inquiries regarding the Ticket program and other resources described above. As described in subsection F below, inquiry specialists must be capable of performing tasks that are more complex than those required in

a typical call center. The BASS shall anticipate receiving most inquiries from ticket-eligible beneficiaries. However, inquiries may be received from SSA employees, ENs, State agencies, other Federal agencies (including the President's executive staff and Congressional staffs), advocacy groups, and other interested parties representing the public at large. The BASS shall refer calls from ENs to the OSM.

The **Helpline** inquiry specialists shall be capable of:

- Assisting beneficiaries in locating ENs who would be willing to accept their Ticket and can provide appropriate services;
- Providing special assistance in locating ENs to beneficiaries whose Tickets have been unassigned, or who were receiving services from an SVRA where the SVRA elected to receive payment under the cost reimbursement option and has closed the beneficiary's case;
- Answering general and specific questions about the Ticket Program and other SSA work supports;
- Differentiating between calls related to the Ticket Program, employment, and rehabilitation, and calls requiring referrals to other support organizations (such as State VR agencies, WIPA projects, and PABSS organizations) or SSA;
- Making appropriate referrals to WIPAs, including all I&R functions;
- Registering interested beneficiaries for WISE **Webinar** events;
- Identifying calls related to Ticket on Demand, Timely Progress Reviews and Ticket status and Ticket assignments and referring them directly to the OSM;
- Referring non-Ticket related calls to the appropriate offices or organizations.

F. The **Helpline** inquiry specialists shall maintain comprehensive logs of the types, subject matter, length, and disposition of all calls broken out by the categories listed in subtask 4D above (plus an "all other" category). This information shall be made available to SSA upon request.

G. SSA will provide the following supports to the Helpline towards the completion of activities under this task:

- a. Knowledge, skills and abilities required for **Helpline** staff;
- b. Access to all necessary SSA electronic data bases;
- c. Access to ongoing technical support for SSA's contractor-supported ETO data base; and
- d. Work incentives training and ongoing technical support provided by SSA's WIPA Training and Technical Assistance contractor.

H. The **Helpline** shall be capable of receiving and responding to inquiries transmitted via electronic mail (email). The BASS shall establish and maintain an email address that will be marketed by SSA to prospective users concurrently with the Ticket to Work Hotline toll-free telephone number.

- I. In its proposal, the contractor shall provide target goals for all metrics appropriate to call center operations, e.g., service level, response time, abandon rate and blockage. The contractor also shall describe their proposed quality assurance methods to ensure that they meet these goals.

TASK 5. BENEFICIARY SUPPORT WEB SITE

The BASS shall establish and manage a web site to provide critical information to beneficiaries in an easily accessible format. The focus of the web site shall be to (1) alert Ticket-eligible beneficiaries to EN and State VR services available to them under the Program; (2) provide information related to the performance of ENs; and 3) maintain and monitor a section where beneficiaries can post comments on their experiences in the Ticket Program.

- A. The web site shall include, but not be limited to, the following topics:
1. General information about the Ticket Program;
 2. Information about the availability of services offered by ENs and State VR agencies, WIPAs and PABSS;
 3. Information on the results of the Annual Performance and Outcome Report/EN Report Card collected by the OSM. This information will be produced by the OSM and SSA will provide it to the BASS;
 4. Information on the advantages of work, i.e., the potential for financial independence;
 5. A monitored user comments section;
 5. Success stories developed by the BASS; and
 6. Links to other web sites of interest to Ticket Program participants, as well as the vocational rehabilitation community at large.
- B. The web site shall meet all technology access requirements of Section 508 of the Rehabilitation Act of 1973, as amended.
- C. The contractor shall ensure that web site contents are reviewed no less than weekly to add new information, update current information, and eliminate outdated information

TASK 6. BENEFICIARY OUTREACH

The BASS shall develop, implement, and manage an ongoing, nationwide outreach effort to Ticket-eligible beneficiaries to educate them on the benefits of participating in the Ticket Program. Through this effort the contractor shall increase beneficiary participation in the Ticket Program by at least 15,000 additional ticket assignments each year. Elements of this effort shall include, but not be limited to:

- Developing and implementing targeted outreach campaigns, including Integrated Voice Response (IVR) calls, messages and materials, and identifying delivery channels for reaching beneficiaries and their support groups;

- Conducting outreach activities such as public awareness and education forums for targeted audiences, such as SSA Ticket-eligible beneficiaries and their families, youth with disabilities, advocacy and support groups, etc;
- Working with SSA staff to coordinate outreach events and develop marketing materials as needed; and
- Using internet-based marketing and social media.

Targeted Marketing

The BASS shall develop and implement methodologies and strategies for targeting Ticket-eligible beneficiaries who are the most likely candidates to work and participate in the Ticket Program. Research to date has shown that the most likely candidates to participate in the Ticket Program are younger individuals with a previous work history. SSA shall provide the BASS with any available data to assist in the completion of this task. **These methodologies shall include IVR calls as directed by SSA.**

TASK 7. SUPPORTING WORK INCENTIVES SEMINAR (WISE) WEBINAR EVENTS

As part of their beneficiary outreach efforts, the BASS shall conduct at least 18 WISE webinars each year. Except as noted below, the webinar subjects will be flexible, and the BASS shall submit each topic in advance for COTR approval. The BASS will be responsible for speakers and subject matter experts, with SSA assistance when necessary.

The BASS shall feature the benefits of work, with particular focus on the potential for and advantages of financial independence, as the primary focus of at least 2 webinars per year. Each webinar the BASS conducts, no matter the subject, shall include information on the benefits of work, including the potential for financial independence. SSA will be primarily responsible for the content on this subject.

The BASS shall include in each webinar 2 or 3 possible actions for the beneficiaries to take after the webinar. Examples of these actions include the beneficiary contacting the beneficiary call center, requesting a list of ENs, and contacting ENs. The BASS shall submit, as part of their webinar plan, the proposed method for measuring this impact.

TASK 8. FACILITATING BENEFICIARY ACCESS TO ENs

The BASS shall facilitate access by Ticket-eligible beneficiaries to ENs capable and willing to serve them. In addition to fulfilling the requirements of this task, the BASS's analysis conducted under this task will be very useful in ensuring that the OSM has all relevant information in conducting their EN recruitment and activation tasks.

- A. The BASS shall provide beneficiaries with current information on EN availability and services (including requests for lists of ENs located in a geographic area and ENs specializing in or providing services for people with specific impairments; e.g., blind individuals).

- B. The BASS shall perform ongoing analysis of the barriers to EN-beneficiary linkage to assist SSA in developing strategies to overcome those barriers. In performing this analysis the BASS shall consult with SSA staff, as well as survey other available information sources (e.g., the OSM).
- C. The BASS shall prepare specialized lists of ENs and other EN-related data to be provided to the SSA (or SSA's designated agents) upon request to assist in the development, implementation, and maintenance of the Ticket Program.
- D. The BASS shall assist all beneficiaries whose Tickets have been unassigned, regardless of whether the beneficiary or the EN made that request. The BASS will access this information once per business day through SSA's system/database. The BASS shall make a determination of at least 90 percent of these beneficiaries' needs within 30 days of receiving information that the Ticket was unassigned. If appropriate, the BASS will help these beneficiaries find an EN who is willing and able to provide support services.
- E. The BASS shall assist all beneficiaries who received services from an SVRA, where 1) the SVRA elected to receive payment under the cost reimbursement option; 2) the SVRA has successfully closed the beneficiary's case according to the rules governing SVRA closures and; 3) the beneficiary is working at or above SGA. SSA will provide the information necessary to identify these beneficiaries. Through these efforts, the BASS will ensure that at least 5% of these beneficiaries assign their Ticket to an EN within 90 days of the VR case closure.

TASK 9. BENEFICIARY SATISFACTION SURVEYS

The Ticket to Work and Work Incentives Improvement Act directs SSA to conduct periodic surveys of beneficiaries receiving services under the Ticket Program to ensure effective quality assurance in the provision of services by ENs. In this task the BASS will identify and work with a nationally recognized expert on conducting surveys on the use and effectiveness of return to work and rehabilitation services. SSA will provide the minimum data elements to be captured by the survey. Based on this, the expert will develop the survey instrument, determine the survey sample, and the method of conducting the survey. After SSA receives OMB clearance for the survey instrument (if necessary; see Task 11), the expert contractor shall conduct the surveys, and the contractor shall provide a complete analysis of survey results. The BASS shall share the results of each survey with SSA according to the schedule in section F.2.

TASK 10. PREPARE OFFICE OF MANAGEMENT AND BUDGET (OMB) CLEARANCE PACKAGE

If the survey instrument has not received OMB approval, the contractor shall prepare a draft OMB clearance package for the beneficiary survey instrument and associated data collection. The contractor shall participate in any briefings with OMB on the survey clearance package. After OMB comments are received, the contractor shall prepare a final OMB clearance package that takes into consideration any modifications imposed by OMB. While SSA retains the ultimate responsibility for obtaining OMB approval, the draft package is intended to assist SSA

in that process. Critical components of the draft OMB clearance package for which the contractor is responsible include:

- the supporting statement;
- detailed questionnaire descriptions;
- consent forms to be signed by all respondents explaining the voluntary nature of the project and the rights of the respondent; and
- copies of the final survey instruments in each language in which it is to be administered.

The supporting statement must include: (1) survey justification -- necessity of information collection, use of information, efforts to reduce the burden of responding, efforts to identify and reduce duplication, assurance of confidentiality, estimates of collection burden, plans for tabulation, statistical analysis, and publication; and (2) statistical methods -- potential respondent universe and sampling method, procedures for collection of information, methods to maximize response rates, and tests of procedures or methods. At the time the OMB package is produced, the sample design will be based on the theoretical development that will not have been tested because the data necessary to do so will not yet be available.

The contractor shall frequently consult with the COTR during preparation of the draft OMB clearance package to ensure that all required elements are included. The contractor's final draft of the clearance package shall be delivered to the COTR.

TASK 11. BENEFICIARY DISPUTE RESOLUTION

- A. The BASS shall be responsible for resolving disputes between beneficiaries and ENs in accordance with dispute resolution procedures they establish. In order to ensure an orderly and efficient process for resolving beneficiary disputes, the BASS shall, within the timeframe stated in Section F:
1. Advise beneficiaries of the role and availability of PABSS grantees in the dispute resolution process, as appropriate. As necessary, alert the appropriate PABSS grantee of the need for participation in an EN/beneficiary dispute.
 2. Refer to SSA all instances of dispute between a beneficiary and an EN for which the BASS cannot negotiate a mutually agreeable resolution.
 3. Submit such referrals in writing and clearly set forth the issue(s) at hand; the facts pertaining thereto; any relevant evidence; and the BASS's conclusion(s), recommendation(s) and supporting arguments, including appropriate statements or quotes from the statute and/or regulations.
- B. Disputes between beneficiaries and State VR Agencies shall be referred to the State Client Assistance Program under the Rehabilitation Act of 1973. Both SSA and the OSM shall be notified of such referrals.

- C. The BASS shall maintain discrete and comprehensive records of all instances of disputes referred to the SSA, and shall provide assistance to the SSA as necessary to facilitate the investigation and resolution of each issue.
- D. The BASS shall be available to assist the SSA with implementation of the SSA decision with respect to any programmatic, administrative or other actions required under this task or by the statute and/or regulations.
- E. The BASS shall provide a summary of all dispute resolution activities in the Monthly Contract Progress Report.

TASK 12. RESPONSE TO SENSITIVE INQUIRIES

The BASS shall notify the COTR of any inquiries regarding the Ticket Program that appear to be sensitive.

- A. In order to ensure an orderly and efficient process for responding to sensitive inquiries, the BASS shall, within the timeframes stated in Section F:
 - 1. Notify the COTR immediately, by telephone and confirmation by email, of inquiries from public officials, the President's executive staff, Congressional delegates and staff, other government officials and agencies, and the news media.
 - 2. Provide complete information with respect to the caller, the nature of the call, the issues raised, the name of the beneficiary if the call is made on a beneficiary's behalf, and the disposition of the call.
- B. The COTR shall inform the BASS of any action to be taken to respond to the inquiry, as appropriate.
- C. A summary of sensitive inquiries and their disposition shall be included in the Monthly Contract Progress Report.

TASK 13. MANAGEMENT INFORMATION AND PROGRESS REPORTS

This task describes the BASS's responsibility for capturing, inputting, and generating data on activities relating to facilitating beneficiary access to ENs, call center and website operations, and support of WISE events. This task also describes the BASS's responsibility with regard to progress reports.

- A. The BASS shall collect, enter, and report on a regular and recurring basis the following data relating to:
 - 1. Beneficiary Access to ENs

- Assistance to beneficiaries whose Tickets have been unassigned, including the number, timeliness and nature of determinations; and
- Assistance to beneficiaries who received services from an SVRA, where the SVRA elected to receive payment under cost reimbursement and has closed the beneficiaries' case, including the number, timeliness and nature of determinations.

2. Call center operations

- Number of incoming and outgoing calls;
- Identification of the caller and/or caller organization;
- Reason for/subject matter of the call;
- Disposition of the call; and
- Number of I&R referrals to WIPA projects.

3. Website operations

- Site visits, including average per day;
- Page visits;
- Referring site; and
- Number of comments.

4. Support for WISE events

- Number of events;
- Location of events;
- Beneficiaries attending;
- ENs attending; and
- Requests for DVD and downloadable file.

B. Progress Reports

The BASS shall prepare and provide to the COTR regular progress reports as described below.

1. Monthly Contract Progress Reports. These reports shall include, but not be limited to, the following information:
 - Summary management information, in chart form, with respect to the data elements identified in section A.1-4 of this Task. This information shall be provided for the current month and for the year to date;
 - Comprehensive description of general progress in performing the work under the contract during the month and cumulatively year-to-date. The description shall include information as to the completion of specific tasks, difficulties or problems encountered in achieving the requirements, resolutions achieved and issues

remaining. This report shall discuss the BASS's outlook for completing outstanding tasks including definitive completion dates;

- Any changes to the BASS's technical approach;
- Comprehensive description of issues requiring the COTR's or the Contracting Officer's decision with regard to the administration of the contract;
- Comprehensive description with respect to how performance standards under this contract have been or are being met;
- Summary of all quality assurance activities and pertinent findings pursuant to Task 7 (Supporting Work Incentives Seminar (WISE) Webinar Events) and Task 8 (Facilitating Beneficiary Access to Employment Networks);
- Summary of all dispute resolution activities pursuant to Task 11 (Beneficiary Dispute Resolution) above;
- Description of any audit activities pursuant to Task 14 (Facilitation of Audits) below; and
- Comprehensive cost information that reflects the use of resources for the current month, as well as year-to-date. At a minimum the comprehensive cost report must reflect:
 - The status of funds under this contract, including the total award amount, total funded amount, expenditures for the month, total expenditures to date for the funding period and total expenditures for the entire contract; and
 - The inventory of staff and subcontractors utilized under this contract during the month, and year-to-date. This section shall indicate any changes in staffing during the month, highlighting both increases and decreases in all key positions and other staffing levels, as well as any redeployment of resources among tasks.

2. Annual Contract Report.

This report shall provide a comprehensive discussion of all contract activities described in this Task for the preceding 12 months of the contract period of performance. The report shall be prefaced by an executive summary highlighting the salient points discussed in the full report.

3. Ad Hoc Reports

The BASS shall be called upon periodically to prepare ad hoc reports using data collected above but tailored to meet specific, non-routine requirements or geared to certain audiences (e.g., data related to targeted mailings).

TASK 14. FACILITATION OF AUDITS

The purpose of this task is to define the responsibilities of the BASS for participation in administrative, programmatic, and financial audits relating to the administration of this contract. To this end, the BASS shall:

- A. Provide assistance in facilitating audits conducted by SSA, OIG, the GAO, and/or other auditors as required by SSA.
- B. Report any audit activities in the Monthly Contract Progress Report.

TASK 15. PERIODIC MEETINGS

- A. The BASS shall meet with the COTR on a regular basis to discuss and review issues of mutual concern with regard to contract administration and the achievement of program objectives. Meetings may be as frequent as weekly or as occasional as quarterly.
- B. It is expected that most meetings will be conducted via teleconference, although the BASS should plan for at least twelve (12) meetings to be held at SSA Headquarters in Baltimore, MD, during any given year.

TASK 16. CONTRACTOR COORDINATION

As indicated in Section C-1.B.5. (Definition of Program Manager), responsibility for Ticket Program administration and support will be divided between two (2) contractors.

- A. The COTR shall be responsible for overseeing and monitoring the contractors' performance and providing technical direction, as necessary.
- B. The BASS shall coordinate with SSA and/or the TPDOCM contractor, the OSM (upon award of the OSM contract), and the current PMRO contractor, those activities that impact the performance of the BASS contract. To this end, the BASS shall:
 - Collaborate to develop procedures to facilitate any coordinative activities (e.g., data exchanges, data input and access with respect to the Ticket Program data files maintained by SSA and/or the TPDOCM contractor, proposed systems modifications);
 - Bring immediately to the attention of the COTR for resolution any communications or process breakdowns between contractors if they cannot be resolved otherwise; and
 - Attend Ticket Program contractor meetings called by the COTR to discuss issues of mutual interest.

SECTION F

DELIVERIES OR PERFORMANCE

F-1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this address: <http://www.arnet.gov>.

CLAUSE	TITLE	DATE
52.242-15	Stop-Work Order (AUG 1989), Alternate I	Apr-84
52.247-35	F.O.B. Destination, Within Consignee's Premises	Apr-84

F-2 DELIVERIES OR PERFORMANCE

The work to be performed hereunder shall be completed by not later than 60 months after the date of contract award. The work is to be accomplished by phases. The following are the estimated periods of performance of each phase:

Period	Description	Completion Date
Base year	Implementation of BASS Services	12 months from date of contract award
Option 1	Continuation of the BASS Services	24 months from date of contract award
Option 2	Continuation of the BASS Services	36 months from date of contract award
Option 3	Continuation of the BASS Services	48 months from date of contract award
Option 4	Continuation of the BASS Services	60 months from date of contract award

The following items shall be delivered to the Contracting Officers Technical Representative (COTR) (FOB Destination):

Name: **Laura York**

Address: **Social Security Administration**
107 Operations Bldg
6401 Security Blvd
Baltimore, MD 21235

Email: Laura.York@ssa.gov

An electronic copy in the appropriate Microsoft Office format, shall be sent to the COTR and the contracting officer (additional names will be added at a later date). Items sent monthly shall be within three days after the end of the monthly timeframe unless otherwise indicated. Days listed on this schedule are calendar days unless otherwise indicated.

Item #	TASK	DESCRIPTION	DUE DATE
1	1.A	Arrange orientation meeting with COTR	Not later than (NLT) three (3) days following contract award
2	2.A	Final Start-up Plan	NLT 7 days after orientation
3	2.D	Prepare Start-Up Status Reports	Weekly, following SSA approval of deliverable #2
4	2.E	Certify completion of start-up activities	30 days after award
5	3.A	Contact COTR to arrange SSA systems orientation meeting and review systems file access retrieval	To be held in conjunction with Task 1.A
6	3.A-B	Be capable of TPDOCM access/utilization and become familiar with management information data elements as described under this section	30 days after award
7	3.E	Establish stand-alone systems as adjunct to TPDOCM	30 days after award
8	3.H.2	Designate Chief Security Officer	7 days after award
9	4	Certify completion of the establishment of the toll-free telephone call center process	30 days after award
10	5	Establish beneficiary support web site	30 days after award
11	7	Submit webinar plan	30 days after award
12	8.A	Provide database of current ENs	30 days after award and ongoing
13	8.D	Determine 90 percent of beneficiaries' needs after ticket unassignment	NLT 30 days after receiving information
14	8.E	Ensure that at least 5% of beneficiaries with successful VR closures who are working above SGA assign their Ticket to an EN. within 90 days of the VR case closure.	NLT 90 days after VR case closure
15	9, 10	Draft OMB clearance package,	90 days after award

		including survey instrument	
16	10	Revised OMB clearance package	60 days of receiving OMB comments
17	9	Conduct beneficiary satisfaction survey	3 months of receiving OMB approval
18	11	Dispute resolution	Initial contacts with disputing parties shall be made within 1 business day of receipt of dispute
19	11	Dispute resolution	Refer all disputes to SSA within 1 business day of determination that they cannot be resolved
20	12	Response to sensitive inquiries	Notify the COTR immediately by telephone and within 1 business day followed up electronically
21	9	Submit survey analysis	60 days following each survey
23	13.D.1	Monthly contract progress reports	Monthly, NLT 14 workdays following last day of month
24	13.D.2	Annual Report	Annually, NLT 30 days following period of performance
25	14	Facilitation of audits	As requested

F-3 **PLACE OF PERFORMANCE**

Services shall be performed at the contractor's facility and Social Security Administration facilities.

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT				1. CONTRACT D CODE		PAGE OF PAGES	
						1 12	
2. AMENDMENT/MODIFICATION NO.		3. EFFECTIVE DATE		4. REQUISITION/PURCHASE REQ. NO.		5. PROJECT NO. (If applicable)	
000008		09/29/2012		K501-12-1007			
6. ISSUED BY		CODE		7. ADMINISTERED BY (If other than Item 6)		CODE	
Social Security Administration		00600		ERICA DAY		EDAY	
Office of Acquisition and Grants				(410) 965-9512			
1st Floor - Rear Entrance							
7111 Security Boulevard							
Baltimore MD 21244-1811							
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)				(x)			
BOOZ ALLEN HAMILTON INC.				9A. AMENDMENT OF SOLICITATION NO.			
Attn: JORDAN GREEN				9B. DATED (SEE ITEM 11)			
8283 GREENSBORO DRIVE							
MCLEAN VA 221023838				x 10A. MODIFICATION OF CONTRACT/ORDER NO.			
				SS00-10-60103			
				10B. DATED (SEE ITEM 13)			
CODE				FACILITY CODE			
				09/29/2010			
11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS							
☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended ☐ is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.							
12. ACCOUNTING AND APPROPRIATION DATA (If required)				Net Increase:		\$11,139,236.00	
400K501/2012/2511/2828704/K501-12-1007							
13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.							
CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.						
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).						
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:						
X	D. OTHER (Specify type of modification and authority) Bilateral - FAR 52.243-2 Changes - Cost Reimbursement (AUG 87)--Alt I (APR 84)						
E. IMPORTANT Contractor ☐ is not. ☒ is required to sign this document and return <u>1</u> copies to the issuing office.							
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)							
DUNS Number: 006928857							

Beneficiary Access and Support Services (BASS) contractor.

The purpose of this modification is to:

1) Exercise and Fund Option Period Two for 12 month period through 09/28/2013;

2) Add in-scope work to Task 4 of Contract Section C-3 and provide additional funding for this work; and

Continued ...

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)	
		CHRISTOPHER BRENNAN	
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16C. DATE SIGNED	
Contractor Signature Received	09/28/2012	09/28/2012	
(Signature of person authorized to sign)			

CONTINUATION SHEET	REFERENCE NO. OF DOCUMENT BEING CONTINUED SS00-10-60103/000008	PAGE	OF
		2	12

NAME OF OFFEROR OR CONTRACTOR
BOOZ ALLEN HAMILTON INC.

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	3) Change the Alternate COTR from Mark Green to Carol Cohen in Contract Sections G-5 and H-11 4) Incorporate the updated Wage Determination in Contract Section J See continuation pages with yellow highlight to identify specific changes. Period of Performance: 09/29/2010 to 09/28/2013 Change Item 0003 to read as follows (amount shown is the obligated amount):				
0003	Option Period Two (9/29/2012 - 9/28/2013) and additional in-scope work for Task 4 Obligated Amount: \$11,139,236.00				11,139,236.00
	Add Item 0006 as follows:				
0006	Additional In-Scope Work Task Four - Option Year 3 (09/29/2013 - 09/28/2014) Amount: \$3,023,975.00 (Option Line Item)				0.00
	Add Item 0007 as follows:				
0007	Additional In-Scope Work Task Four - Option Year 4 (09/29/2014 - 09/28/2015) Amount: \$3,111,879.00 (Option Line Item)				0.00
	There are no other changes to the terms and conditions of the contract as a result of this modification.				

SECTION B-SUPPLIES OR SERVICES AND PRICES/COSTS, B-4 ESTIMATED COST AND FEE-COMPLETION CONTRACT, paragraphs a, b and c are changed to read as follows to (a) increase the total cost to the Government for full performance from \$41,763,065.00 by \$9,044,141.00 to \$50,807,206.00; (b) increase the amount of incremental funding from \$16,568.126.00 by \$11,139,236.00 to \$27,707,362.00; (c) extend the performance period by 12-months; and (d) incorporate the updated Wage Determination.

B-4 ESTIMATED COST AND FEE - COMPLETION CONTRACT

- (a) It is estimated that the total cost to the Government for full performance of this contract will be \$50,807,206.00, of which the sum of (b)(4) represents the estimated reimbursable costs and (b)(4) represents the fixed fee.
- (b) Total funds currently available for payment and allotted to this contract are \$27,707,362 of which (b)(4) represents the estimated reimbursable costs and (b)(4) represents the fixed fee. For further provisions on funding, see the Limitation of Funds clause (FAR 52.232-22).
- (c) It is estimated that the amount currently allotted will cover performance through September 28, 2013.
- (d) The Contracting Officer may allot additional funds to the contract without the concurrence of the Contractor.

	Option Year 1	Option Year 2	Option Year 3	Option Year 4
Total Cost	(b)(4)			
Total Fixed Fee				
Total Cost + Fixed Fee	\$8,070,326	\$11,139,236	\$11,420,157	\$11,679,686

SECTION C, DESCRIPTION/SPECIFICATIONS/WORK STATEMENT, C-3 SERVICES TO BE PERFORMED, Task 4 is changed to remove all references to WIPA, add in-scope work for the call center and other minor changes.

C-3 SERVICES TO BE PERFORMED

TASK 4. CALL CENTER OPERATIONS

- A. The BASS shall establish and maintain a toll-free telephone number service to be marketed to prospective beneficiary users by SSA as the "SSA Ticket to Work Helpline" (Helpline). The purpose of this service shall be to:

- Assist beneficiaries in locating and assigning their Ticket to ENs who can provide services that lead to increased work activity and earnings;
- Provide enhanced assistance to beneficiaries whose Tickets have been unassigned or who received services from an SVRA that has closed the case;
- Respond to **general** inquiries relating to the Ticket Program and other resources for beneficiaries who are considering work; and
- ~~Make appropriate referrals to WIPA projects; and~~
- Provide information about all SSA disability work incentives, including a beneficiary's rights and responsibilities.

The BASS shall provide more extensive information concerning relevant work incentives to beneficiaries who indicate that they are actively seeking employment, have been offered a job, or are already working. If the needs of such beneficiaries are beyond the capability of the Helpline staff, they will take appropriate action to connect these beneficiaries with trained benefits counselor staff working under an agreement with the BASS to provide remote work incentives counseling.

The BASS shall **add up to 20** remote trained benefits counselors to provide individualized benefits counseling to such beneficiaries across the country via telephone, secure electronic mail, and secure, low-cost Voice over Internet Protocol (VoIP) technology, or a combination thereof. **The BASS shall determine if it is possible to refer beneficiaries who cannot be served by the remote benefits counselors to Certified Work Incentives Counselors working in the community, e.g., at Vocational Rehabilitation agencies. SSA will assist the BASS in making this determination.**

These trained benefits counselors shall meet the following minimum skill requirements.

The ability to:

- 1) Understand and communicate the work incentives and support programs available to individuals with disabilities who are actively seeking employment, have been offered a job, or who are already working, and who receive financial supports or services, and the impact of work activity on those benefits.
- 2) Assist beneficiaries to understand not only their benefits supports, but also how to use work incentives and other tools to assist them to achieve self-sufficiency through work.
- 3) Provide proper documentation of services, including creating Benefits Summaries and Analyses and Work Incentive Plans.
- 4) Deliver integrated services that are sensitive to individual needs such as barriers created by disability, language, or culture.

~~5) Monitor and improve the quality of services.~~

6) Use a variety of technologies to effectively communicate complex information to beneficiaries and have a basic ability to troubleshoot that technology, to be able to accurately describe technology-related problems to distantly-located technology support staff and to follow basic remediation techniques suggested by technology support staff.

B. Under the current contract, the OSM has the responsibility for maintaining the Ticket Program call center. The BASS will provide their plan for assuming this task while ensuring that there is no break in service.

C. The toll-free service shall provide the following capabilities:

1. Operate from 8:00 a.m. to 8:00 p.m., Eastern Time, Monday through Friday of each week, excluding Federal holidays;
2. Provide simultaneous service to multiple callers;
3. Provide Spanish language service; and
4. Provide Text Telephone Communication Service for the hearing and speech-impaired;
5. Provide after-hours service via voicemail.

D. The nature of inquiries and actions shall include, but not be limited to, the following topics.

1. Assisting beneficiaries in locating and assigning their Ticket to ENs.

The Helpline shall:

a. As provided in Task 8, provide current information on EN availability and services (including requests for lists of ENs located in a geographic area and ENs specializing in or providing services for people with specific impairments; e.g., blind individuals);

b. As provided in Task 8, assist all beneficiaries ~~whose Tickets have been unassigned and~~ ~~all beneficiaries~~ who received services from an SVRA, where the SVRA elected to receive payment under the cost reimbursement option and has closed the beneficiary's case;

c. Take appropriate action on requests for a "Ticket on Demand." A Ticket-eligible beneficiary may request a Ticket on Demand in cases where he/she wants a paper ticket.

In such instances, the beneficiary may contact the BASS Helpline to request a Ticket. The BASS shall immediately forward the beneficiary's request to the OSM, which will consult SSA's control file to confirm Ticket eligibility and then mail a Ticket to the beneficiary using a format prescribed by SSA;

d. Take appropriate and immediate action on questions from beneficiaries about Ticket status and Ticket assignments; and

e. Take appropriate action on questions from beneficiaries about Timely Progress Reviews. SSA periodically conducts medical reviews to determine if an individual continues to meet the medical requirements to collect disability. If the person does not continue to meet the medical requirements, SSA may stop the disability benefits. Beneficiaries who are participating in the Ticket Program will not undergo medical reviews as long as they are making "timely progress." Periodically SSA, through the OSM, will conduct a Timely Progress Review for each beneficiary who is participating in the Ticket Program. The mailing associated with these reviews will generate calls to the Hotline, and the BASS shall immediately transfer such calls to the OSM.

2. Responding to general inquiries relating to the Ticket Program and other resources for beneficiaries who are considering work.

This shall include, but not be limited to:

a. Basic information about the Ticket to Work Program and the resources available through the Program;

b. Basic explanations of the impact of work on Social Security cash and related benefits;

c. Information about reporting requirements, including telephone wage reporting, and procedures such as maintaining records of work activities and expenses;

d. Information about basic rights of appeal;

e. Information about the State VR process, and referrals as appropriate;

~~f. Information about Protection and Advocacy for Beneficiaries of Social Security (PABSS) services, and referrals as appropriate;~~

f. Referrals to organizations responsible for subsidized housing, Food Stamps, food banks, energy assistance, Medicaid and other benefits resources, as appropriate;

g. Information about program-related activities (e.g., demonstration projects, outreach events); and

- h. Information about other resources (e.g., disability program navigator in the Department of Labor's One-Stops under the Workforce Investment Act of 1998 and the Small Business Administration).

3. Making appropriate referrals to WIPA projects

a. The Helpline shall make referrals to WIPA projects serving all geographic areas via approved electronic media. This includes cases where the Helpline determines that a referral to a WIPA is appropriate based on an inquiry from a beneficiary, as well as cases where the beneficiary contacts a WIPA, which then refers the information to the Helpline. In making these referrals, the Helpline shall perform all I&R functions for all WIPA projects.

The Helpline shall ensure that all referrals to WIPA projects are appropriate; i.e., beneficiaries who desire a thorough analysis of the impact of work on their benefits in order to make full use of the services and supports available to them as they advance toward self-supporting employment. The Helpline shall function as an intermediary service and shall not be designed to replace WIPA services.

b. In making a referral, the Helpline shall:

- 1) Verify and relay electronically to the WIPA project selected beneficiary information available to the BASS from approved Ticket Program data bases;
- 2) Document a referral of a beneficiary to a WIPA by completing all required fields in the I&R section of the WIPA program's electronic ETO data base.

4. Providing basic information about all SSA work incentives, as follows:

- a. Title II work incentives, including trial work period, substantial gainful activity (SGA) determinations, including impairment-related work expenses (IRWE) and subsidy deductions, extended period of eligibility, expedited reinstatement of benefits and reapplication for disability benefits;
 - b. Title XVI work incentives, including student earned income exclusion, earned income exclusion, IRWE, blind work expenses, continued Medicaid for people who work, property essential for self-support and an introduction to the Plan to Achieve Self-Support; and
 - c. Title XVIII work incentives, including extended Medicare coverage and Medicare for beneficiaries with disabilities who are working.
- E. The Helpline shall be staffed by trained inquiry specialists capable of providing a wide range of information necessary to respond to general and specific inquiries regarding the Ticket program and other resources described above. As described in subsection F below, inquiry

specialists must be capable of performing tasks that are more complex than those required in a typical call center. The BASS shall anticipate receiving most inquiries from ticket-eligible beneficiaries. However, inquiries may be received from SSA employees, ENs, State agencies, other Federal agencies (including the President's executive staff and Congressional staffs), advocacy groups, and other interested parties representing the public at large. The BASS shall refer calls from ENs to the OSM.

The Helpline inquiry specialists shall be capable of:

- Assisting beneficiaries in locating ENs who would be willing to accept their Ticket and can provide appropriate services;
- Providing special assistance in locating ENs to beneficiaries whose Tickets have been unassigned, or who were receiving services from an SVRA where the SVRA elected to receive payment under the cost reimbursement option and has closed the beneficiary's case;
- Answering general and specific questions about the Ticket Program and other SSA work supports;
- Differentiating between calls related to the Ticket Program, employment, and rehabilitation, and calls requiring referrals to other support organizations (such as State VR agencies, ~~WIPA projects, and PABSS organizations~~) or SSA;
- ~~• Making appropriate referrals to WIPAs, including all I&R functions;~~
- Recognizing when a caller would benefit from the services of the remote trained benefits counselors and taking appropriate steps to make that connection (see section F);
- Registering interested beneficiaries for WISE Webinar events;
- Identifying calls related to Ticket on Demand, Timely Progress Reviews and Ticket status and Ticket assignments and referring them directly to the OSM;
- Referring non-Ticket related calls to the appropriate offices or organizations.

F. As provided in section A of this Task, if Helpline staff cannot answer questions from beneficiaries who are actively seeking employment, have been offered a job, or are already working, they shall take appropriate steps to connect these beneficiaries with trained benefits counselors working remotely for the BASS. SSA will not provide these benefits counselors with access to MAXSTAR.

The BASS shall propose a method for making the handoff from the Helpline to the remote benefits counselors in a manner that safeguards personally identifiable information from loss, theft, or inadvertent disclosure. The BASS shall address in its proposal the efficacy of contracting with Social Solutions or another company that provides software similar to the Efforts to Outcome (ETO) software developed by Social Solutions that SSA provided its Work Incentives Planning and Assistance grantees, which the BASS can use for this initiative. SSA must approve all software.

The remote benefits counselors shall provide services that are consistent with their training and certification. The benefits counselors shall customize services to meet the needs of the beneficiaries. These remote benefits counselors shall have a caseload of no more than 50 beneficiaries at any given time. Each of the remote benefits counselors must be familiar with the benefits, services, employment environment, etc., in his or her local area. The BASS shall establish the catchment area for each benefits counselor, and the call center shall refer beneficiaries to these counselors only if the zip code matches one of the catchment areas. The Helpline staff shall continue to handle all calls from all other beneficiaries according to current procedures.

The BASS shall determine if it is possible to refer beneficiaries who cannot be served by the remote benefits counselors to Certified Work Incentives Counselors working in the community, e.g., at Vocational Rehabilitation agencies. SSA will assist the BASS in making this determination.

The goal of these counseling services is to help beneficiaries reach their employment goals and attain financial independence without incurring overpayments. Specifically, SSA anticipates that beneficiaries who receive these services will:

- Be more likely to accept job offers,
- Maintain employment,
- Increase their earnings above the SGA level for a sustained period, i.e., they will not “park” under SGA to ensure that they continue to receive cash benefits, and
- Make timely reports of their earnings to SSA, with the assistance of the remote benefits counselors, thus reducing both the incidence and size of overpayments.

G. The Helpline inquiry specialists shall maintain comprehensive logs of the types, subject matter, length, and disposition of all calls broken out by the categories listed in subtask 4D above (plus an “all other” category). This information shall be made available to SSA upon request.

H. SSA will provide the following supports to the Helpline towards the completion of activities under this task:

- a. Knowledge, skills and abilities required for Helpline staff;
 - b. Access to all necessary SSA electronic data bases;
 - c. ~~Access to ongoing technical support for SSA's contractor supported ETO data base;~~
~~and~~
 - d. Work incentives training and ongoing technical support provided by SSA's ~~WIPA~~ Training and Technical Assistance contractor.
- I. The Helpline shall be capable of receiving and responding to inquiries transmitted via electronic mail (email). The BASS shall establish and maintain an email address that will be marketed by SSA to prospective users concurrently with the Ticket to Work Hotline toll-free telephone number.
- J. In its proposal, the contractor shall provide target goals for all metrics appropriate to call center operations, e.g., service level, response time, abandon rate and blockage. The contractor also shall describe their proposed quality assurance methods to ensure that they meet these goals.
- K. With regard to the services provided by the remote trained benefits counselors as outlined in section F of this Task, the BASS shall submit a detailed plan describing how they plan to hire and manage up to 20 remote benefits counselors. The plan shall include, among other issues, the interaction between the Helpline and the benefits counselors, suitability and security in accordance with the terms of this contract, the management information system, and a full description of the services these benefits counselors will provide.
- L. SSA will measure the BASS's success under this Task by the BASS's ability to achieve the performance standards below:
- 1. The remote benefits counselors shall contact at least 90% of beneficiaries referred by the Helpline within 3 working days.
 - 2. The remote benefits counselors shall complete a baseline assessment on 100% of beneficiaries referred by the Helpline.
 - 3. The remote benefits counselors shall assist at least 75% of the beneficiaries to whom they are providing services and are working with timely earnings reports to SSA. This shall include an SSA-820/821 when appropriate.

4. At least 50% of the beneficiaries the remote benefits counselors serve will assign their ticket to an EN within 3 months of initiation of services.

M. The remote benefits counselors shall terminate services to beneficiaries who have not assigned their ticket to an EN within 6 months of initiation of services. The benefits counselors will take appropriate action before closing the cases.

SECTION G, CONTRACT ADMINISTRATION DATA, G-5 DESIGNATION OF GOVERNMENT CONTRACTING OFFICER'S TECHNICAL REPRESENTATIVE has been updated to change the Alt. COTR from Mark Green to Carol Cohen.

G-5 DESIGNATION OF GOVERNMENT CONTRACTING OFFICER'S TECHNICAL REPRESENTATIVE

- (a) The individual(s) named below is hereby designated as the Government Contracting Officer's Technical Representative (COTR). If an alternate COTR is also listed below, that person will serve in the COTR's stead when the COTR is unavailable. The COTR is responsible for the technical administration of this contract, [in accordance with the provisions of the clause included herein entitled, "Technical Direction."]

NAME

ADDRESS

COTR

Laura York
410-966-1177
Laura.York@ssa.gov

107 Operations Bldg
6401 Security Blvd
Baltimore, MD 21235

Alternate COTR

Carol Cohen
410-965-5040
Carol.Cohen@ssa.gov

283 Operations Bldg
6401 Security Blvd
Baltimore, MD 21235

The COTR, or his/her authorized representative, shall be responsible for coordinating with the contractor the technical aspects of the contract. The COTR is not authorized to make any changes, which affect the contract amount, terms or conditions. The contracting officer is the only person with the authority to act as agent of the Government under this contract. Only the contracting officer has authority to: (1) direct or negotiate any changes in the Statement of Work; (2) modify or extend the period of performance; (3) change the delivery schedule; (4) authorize reimbursement to the contractor any costs incurred during the performance of this contract; or (5) otherwise change any terms and conditions of this contract.

SECTION H, SPECIAL CONTRACT REQUIREMENTS, SECTION H-11 PROTECTING AND REPORTING THE LOSS OF PERSONALLY IDENTIFIABLE INFORMATION: RESPONSIBILITIES CONCERNING INDIVIDUAL EMPLOYEES (DEC2008) has been updated to change the First Alternate from Mark Green to Carol Cohen.

H-11 PROTECTING AND REPORTING THE LOSS OF PERSONALLY IDENTIFIABLE INFORMATION: RESPONSIBILITIES CONCERNING INDIVIDUAL EMPLOYEES (DEC 2008)

- (1) **My primary SSA contact for reporting the loss, compromise, or potential compromise of PII is:** *Laura York*
Contracting Officer's Technical Representative
Laura.York@ssa.gov
410-966-1177

The alternates to this primary contact are as follows:

First Alternate: *Carol Cohen*
Alternate Contracting Officer's Technical Representative
Carol.Cohen@ssa.gov
410-965-5040

Second Alternate: *Erica Day*
Contract Specialist
Erica.Day@ssa.gov
410-965-9512

SECTION J, LIST OF ATTACHMENTS, ATTACHMENT J-1, SMALL BUSINESS SUBCONTRACTING PLAN has been updated to incorporate the revised Small Business Subcontracting Plan; ATTACHMENT J-4, WAGE DETERMINATION, has been changed to provide an updated Wage Determination for Utah.

ATTACHMENT J-1, Small Business Subcontracting Plan



BAH Master
Subcontracting Plan

ATTACHMENT J-4, Wage Determination



Wage
Determination.pdf

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT				1. CONTRACT D CODE		PAGE OF PAGES 1 3									
2. AMENDMENT/MODIFICATION NO. 000009		3. EFFECTIVE DATE 10/15/2012		4. REQUISITION/PURCHASE REQ. NO. N/A		5. PROJECT NO. (If applicable)									
6. ISSUED BY Social Security Administration Office of Acquisition and Grants 1st Floor - Rear Entrance 7111 Security Boulevard Baltimore MD 21244-1811		CODE 00600		7. ADMINISTERED BY (If other than Item 6) SCOTT MARKO (410) 965-9488		CODE SMARKO									
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) BOOZ ALLEN HAMILTON INC. Attn: JORDAN GREEN 8283 GREENSBORO DRIVE MCLEAN VA 221023838				(x)											
				9A. AMENDMENT OF SOLICITATION NO.											
				9B. DATED (SEE ITEM 11)											
				10A. MODIFICATION OF CONTRACT/ORDER NO. SS00-10-60103											
CODE		FACILITY CODE		10B. DATED (SEE ITEM 13) 09/29/2010											
11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS															
☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended ☐ is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.															
12. ACCOUNTING AND APPROPRIATION DATA (If required) N/A															
13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.															
<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:10%;">CHECK ONE</td> <td>A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.</td> </tr> <tr> <td style="text-align: center;">X</td> <td>B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).</td> </tr> <tr> <td></td> <td>C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:</td> </tr> <tr> <td></td> <td>D. OTHER (Specify type of modification and authority)</td> </tr> </table>								CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.	X	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).		C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:		D. OTHER (Specify type of modification and authority)
CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.														
X	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).														
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:														
	D. OTHER (Specify type of modification and authority)														
E. IMPORTANT Contractor ☒ is not. ☐ is required to sign this document and return _____ 0 _____ copies to the issuing office.															
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.) DUNS Number: 006928857 Beneficiary Access and Support Services (BASS) contractor. The purpose of this administrative modification is to change the Government Contract Specialist in Contract Sections G-1 and H-11. See the yellow highlighted portions of the attached for the specific changes. There are no other changes to the terms and conditions of the contract as a result of this modification. Period of Performance: 09/29/2010 to 09/28/2013 Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.															
15A. NAME AND TITLE OF SIGNER (Type or print)				16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)											
				CHRISTOPHER BRENNAN											
15B. CONTRACTOR/OFFEROR		15C. DATE SIGNED		16C. DATE SIGNED											
(Signature of person authorized to sign)				10/15/2012											

SECTION G, CONTRACT ADMINISTRATION DATA, G-1 DESIGNATION OF GOVERNMENT CONTRACT SPECIALIST has been updated to change the Contract Specialist, from Erica Day to Scott Marko.

G-1 DESIGNATION OF GOVERNMENT CONTRACT SPECIALIST

Scott Marko, Contract Specialist, Division of Programs Contracts, has been assigned to administer the contractual aspects of this contract. However, changes in the Scope of Work, contract cost, price, quantity, quality, or delivery schedule shall be made only by the Contracting Officer by a properly executed modification. All correspondence that in any way concerns the terms or conditions of this contract shall be submitted directly to the Contract Specialist at the following address:

Social Security Administration
Attn: Scott Marko
Office of Acquisition and Grants
1st Floor - Rear Entrance
7111 Security Boulevard
Baltimore, Maryland 21244

Telephone Number: 410-965-9488
E-mail Address: Scott.Marko@ssa.gov

SECTION H, SPECIAL CONTRACT REQUIREMENTS, SECTION H-11
PROTECTING AND REPORTING THE LOSS OF PERSONALLY IDENTIFIABLE
INFORMATION: RESPONSIBILITIES CONCERNING INDIVIDUAL EMPLOYEES
(DEC2008) - *Worksheet for Reporting the Loss, Compromise, or Potential Compromise
of Personally Identifiable Information* has been updated to change the secondary SSA
contract from Erica Day to Scott Marko.

**H-11 PROTECTING AND REPORTING THE LOSS OF PERSONALLY
IDENTIFIABLE INFORMATION: RESPONSIBILITIES CONCERNING
INDIVIDUAL EMPLOYEES (DEC 2008)**

**Worksheet for Reporting the Loss, Compromise, or Potential Compromise of
Personally Identifiable Information**

*Contractor and Subcontractor Employees: See last page of this attachment for
instructions on completing this worksheet.*

**(1) My primary SSA contact for reporting the loss, compromise, or potential
compromise of PII is: Laura York**

Contracting Officer's Technical Representative
Laura.York@ssa.gov
410-966-1177

The alternates to this primary contact are as follows:

First Alternate: Carol Cohen

Alternate Contracting Officer's Technical Representative
Carol.Cohen@ssa.gov
410-965-5040

Second Alternate: Scott Marko

Contract Specialist
Scott.Marko@ssa.gov
410-965-9488

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT			1. CONTRACT D CODE		PAGE OF PAGES 1 15					
2. AMENDMENT/MODIFICATION NO. 000010		3. EFFECTIVE DATE See Block 16C		4. REQUISITION/PURCHASE REQ. NO. N/A		5. PROJECT NO. (If applicable)				
6. ISSUED BY Social Security Administration Office of Acquisition and Grants 1st Floor - Rear Entrance 7111 Security Boulevard Baltimore MD 21244-1811		CODE 00600		7. ADMINISTERED BY (If other than Item 6) JOEIE TRACHT (410) 965-9862		CODE JTRACHT				
8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code) BOOZ ALLEN HAMILTON INC. Attn: JORDAN GREEN 8283 GREENSBORO DRIVE MCLEAN VA 221023838				(x)			9A. AMENDMENT OF SOLICITATION NO.			
							9B. DATED (SEE ITEM 11)			
				x			10A. MODIFICATION OF CONTRACT/ORDER NO. SS00-10-60103		10B. DATED (SEE ITEM 13) 09/29/2010	
							CODE		FACILITY CODE	
11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS ☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended ☐ is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.										
12. ACCOUNTING AND APPROPRIATION DATA (If required) N/A										
13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.										
CHECK ONE		A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.								
		B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).								
x		C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: Bilateral - FAR 52.243-2 - Changes-Cost Reimbursement (AUG 87)--Alt I (APR84)								
		D. OTHER (Specify type of modification and authority)								
E. IMPORTANT Contractor ☐ is not. ☒ is required to sign this document and return <u>1</u> copies to the issuing office.										
14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.) DUNS Number: 006928857 Beneficiary Access and Support Services (BASS) The purpose of this modification is to: 1) modify Section B-8 to change the provisional and ceiling indirect cost rates and identify the bases for allocation; 2) update the Invoice Submission and Payment Related Information in Section G-7; 3) add FAR Clause 52.232-99, Providing Accelerated Payment to Small Business Subcontractors Continued ...										
Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.										
15A. NAME AND TITLE OF SIGNER (Type or print)				16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)						
				CHRISTOPHER BRENNAN						
15B. CONTRACTOR/OFFEROR Contractor Signature Received (Signature of person authorized to sign)		15C. DATE SIGNED 03/25/2013		16C. DATE SIGNED 03/27/2013		16B. DATE SIGNED				

CONTINUATION SHEET

REFERENCE NO. OF DOCUMENT BEING CONTINUED
SS00-10-60103/000010PAGE OF
2 15NAME OF OFFEROR OR CONTRACTOR
BOOZ ALLEN HAMILTON INC.

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	(DEVIATION) (Aug 2012) to Section I-2; and 4) update and supplement the Additional Invoice Instructions in Attachment J-2. See the yellow highlighted portions of the attached continuation pages for the specific changes. The total amount obligated under this contract remains unchanged at \$27,707,362.00. There are no other changes to the terms and conditions of the contract as a result of this modification.				

SECTION B, SUPPLIES OR SERVICES AND PRICES/COSTS, is hereby changed to update the provisional rates to reflect Defense Contract Management Agency approved rates and the Contractor's accounting period, to add provisional and ceiling rates for Cost Centers 23, 24, 25 and 27, and identify the bases for the indirect costs rates as follows:

B-8 INDIRECT COST RATES

Beginning with the effective date of this contract, indirect costs shall be reimbursed at the following *provisional* rates:

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 3 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					
Facilities Capital Cost of Money (FCCM)					

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 13 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					
FCCM					

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 14 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					
FCCM					

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 17 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					
FCCM					

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 23 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					
FCCM					

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 24 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					
FCCM					

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 25 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					
FCCM					

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 27 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					
FCCM					

Final indirect cost rates shall not exceed the following *ceiling* rates:

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 3 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 13 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 14 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 17 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 23 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 24 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 25 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					

	YEAR 1 RATE	YEAR 2 RATE	YEAR 3 RATE	YEAR 4 RATE	YEAR 5 RATE
COST CENTER 27 INDIRECT COST	(b)(4)				
Fringe Benefits					
Labor Overhead					
G&A					
Subcontract/Consultant Handling					

The bases for the above indirect cost rates are as follows:

INDIRECT COST	BASIS OF APPLICATION
Fringe Benefits	(b)(4)
Labor Overhead	

	(b)(4)
G&A	
Subcontract/Consultant Handling	
FCCM	

SECTION G, CONTRACT ADMINISTRATION DATA, G-7 INVOICE SUBMISSION & PAYMENT RELATED INFORMATION, is hereby changed as follows:

G-7 INVOICE SUBMISSION & PAYMENT RELATED INFORMATION

~~You may submit your invoice, electronically via email, by regular mail, or by hand carrying it to the Office of Finance at the addresses below. Your invoice must include all of the elements of a proper invoice as defined in the invoice or payment clause used in this award as well as any other information required below or in the contract.~~

~~SENDING THE INVOICE ELECTRONICALLY:~~

~~Submit your invoice either as an attachment to an email message, or within the message itself, to: OFPO.OF.DAP.INVOICES@ssa.gov.~~

~~FOR INVOICES NOT SUBMITTED ELECTRONICALLY:~~

~~Submit an original and three (3) copies of the invoice to:~~

~~If sent by mail:~~

~~Social Security Administration
Office of Finance
Post Office Box 47
Baltimore, Maryland 21235-0047~~

~~If Hand Carried:~~

~~Social Security Administration
Office of Finance
Customer Service Help Desk
2-B-4 East Low Rise Building
6401 Security Boulevard
Baltimore, Maryland 21235-0047~~

~~The telephone number of the customer service help desk is (410) 965-0607.~~

- ~~• Taxpayer Identification Number (TIN) and Dun&Bradstreet Number (DUNS):~~

~~In order to assist the government in making timely payments, please include your TIN, your DUNS#, and the Order Number on each invoice.~~

- ~~• Submission of Electronic Funds Transfer (EFT) Information and Remittance Information:~~

~~FAR Clause 52.232-34 Payment by Electronic Funds Transfer—Other Than Central Contractor Registration, requires contractors to provide the government with the information required to make payments by EFT. If you have not signed up for Direct Deposit by EFT, you will need to complete a Direct Deposit Enrollment Form 3881 to receive payment. Go to SSA's Office of Finance Internet site at <http://www.ssa.gov/vendor/contact.htm> to obtain the form and for submission instructions.~~

~~Remittance information associated with EFT payments is now available via the Payment Advice Internet Delivery (PAID) System on the Department of Treasury's Internet site at <http://fms.treas.gov/paid/index.asp>. This site provides an explanation of the system, how it works, security and access~~

~~information, a user demonstration, and registration information. There is no charge to use the PAID system.~~

~~You may also direct payment inquiries to SSA's Office of Finance by using its Financial Interactive Voice Response System (FIVR). FIVR is an automated self-service telephone system available 24 hours a day that allows direct electronic access to administrative payment information using the telephone keypad. You can access FIVR by calling (410) 965-0607. The services available through FIVR will be available through a Telecommunications Device for the Deaf (TDD) Line at 410-597-1395. Customer Service Representatives will be available to answer vendor payment inquiries Monday – Friday, between 8 a.m. and 4:30 p.m. Eastern Time.~~

~~You may also address any payment inquiries to SSA's Office of Finance by sending an email to payment.inquiries@ssa.gov, or visiting its internet site at <http://www.ssa.gov/vendor/contact.htm>. You can also access the PAID system through a link on this site.~~

The invoice shall include all elements of a proper invoice as defined in the invoice or payment clause used in this award and any other information required below or in any other contract clause. To assist the Government in making timely payments, include the contractor's Taxpayers Identification Number, Data Universal Numbering System number, contract, and the Order Number, if any, on each invoice.

Facsimile (Fax) communication is the preferred method of submission for invoices and public vouchers, because the invoice will be received directly into the SSA payment system. If the invoice cannot be faxed, submit it electronically via email, by regular mail, or by hand carrying it to the Office of Finance at the address below.

If submitting by fax, use any one of the following fax numbers:

410 965-8209
410 965-8251
410 965-8200
410 965-8216
410 966-5425
410 966-9940
410 965-3734
410 965-7533

If submitting electronically:

Submit the invoice either as an attachment to an email message, or within the message itself, to: OTAPS.DAPS.Invoices@ssa.gov.

If sent by mail, submit an original and three (3) copies of the invoice to:

Social Security Administration
Office of Finance
Post Office Box 47
Baltimore, Maryland 21235-0047

If hand carried, deliver to:

Social Security Administration
Office of Finance
Customer Service Help Desk
2-B-4 East Low Rise Building
6401 Security Boulevard
Baltimore, Maryland 21235-0047

The telephone number of the finance customer service help desk is (410) 965-0607.

The Government will make payment to the Contractor using the Electronic Funds Transfer (EFT) information contained in the [Central Contractor Registration \(CCR\)](#) database. In the event that the EFT information changes, the Contractor shall be responsible for providing the updated information to the CCR database. The EFT information submitted must be that of the contractor unless there is an official Assignment of Claims on file with the Office of Finance.

Remittance information associated with EFT payments is available via the Internet Payment Platform (IPP) on the Department of Treasury's Internet site at <http://www.ipp.gov>.

The Contractor may also direct payment inquiries to SSA's Office of Finance by:

- Using its [Financial Interactive Voice Response System \(FIVR\)](#). FIVR is an automated self-service telephone system available 24 hours a day that allows direct electronic access to administrative payment information using the telephone keypad. The contractor can access FIVR by calling (410) 965-0607. The services available through FIVR are available through a Telecommunications Device for the Deaf (TDD) Line at 410-597-1395. Customer Service Representatives will be available to answer vendor payment inquiries Monday - Friday, between 8 a.m. and 4:30 p.m., Eastern Time.
- By sending an email to payment.inquiries@ssa.gov, or visiting the internet site at <http://www.socialsecurity.gov/vendor/contact.htm>. The contractor can also access the IPP system through a link on this site.

SECTION I, CONTRACT CLAUSES, is hereby changed to add the following clause after 52.219-9—SMALL BUSINESS SUBCONTRACTING PLAN (JULY 2010)-ALT II (OCT 2001) but before 52.243-7 – NOTIFICATION OF CHANGES (APRIL 1984):

I-2 CLAUSES INCORPORATED BY FULL TEXT

The following FAR clauses are hereby incorporated in full text:

PROVIDING ACCELERATED PAYMENT TO SMALL BUSINESS SUBCONTRACTORS (DEVIATION) (AUG 2012)

This clause implements the temporary policy provided by OMB Policy Memorandum M-12-16, Providing Prompt Payment to Small Business Subcontractors, dated July 11, 2012.

- a) Upon receipt of accelerated payments from the Government, the contractor is required to make accelerated payments to small business subcontractors to the maximum extent practicable after receipt of a proper invoice and all proper documentation from the small business subcontractor.
- b) Include the substance of this clause, including this paragraph (b), in all subcontracts with small business concerns.
- c) The acceleration of payments under this clause does not provide any new rights under the Prompt Payment Act.

SECTION J, LIST OF ATTACHMENTS, ATTACHMENT J-2, Additional Invoice Requirements, is hereby replaced by the following attachment:

SECTION J

LIST OF ATTACHMENTS

ATTACHMENT J-2, Additional Invoice Requirements



J-2-Additional
Invoice Instructions.c